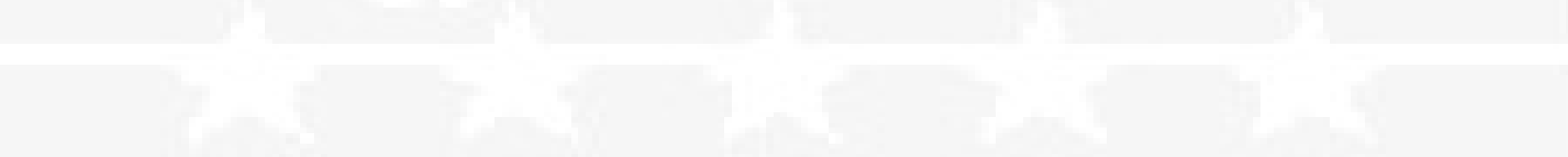




*HERO Operations Manual*

# *Louisiana HERO Operations Manual*

Energy Related Homes



OF LOUISIANA

*Last Revision January 6, 2010*

La Dept. of Natural Resources

*Louisiana Department of Natural Resources*



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***All ratings MUST be submitted by e-mail to :  
ratehero@dnr.state.la.us / ~~W9 faxed to 225 242 3301~~***

***Submitting ratings by e-mail means that :***

- If any information is omitted, or incorrect in a submittal - you will receive an automatic reply from DNR to alert you that something was wrong with your submittal. The reply will not call out what the problem is. You must determine what was omitted, or incorrect and resubmit the entire rating. The reply from DNR is your notification that the submittal was deleted and must be resubmitted in it's entirety.*
- In order for your forms to be properly processed by DNR - your software must be compatible with ours so that the attached, scanned documents (W-9, Certificate of Completion, Economic Summary, Energy Cost and Feature Report, Receipts, and Form 1119's) can be printed for insertion into the application folder.*
- Compatible software includes : Acrobat, Micro Soft Word, Micro Soft Excel, Corel Word Perfect.*
- Every rater must keep a complete copy of every rating submittal sent to DNR, for their own files, which must include the building files, and either a hard copy or an electronic file of the scanned documents that were submitted for the rating.*
- It is mandatory to keep a copy of the receipts for the work performed on all existing homes with your records for the home. You must submit scanned copies of the receipts with your submittal and be able to produce them, if needed, ~~at some point in the future.~~ Every receipt must show the vendors letterhead (no generics) with the vendors name and the vendors phone number. Receipt for mechanical equipment MUST show Make, Model #, and Serial # for every piece of equipment claimed as an energy efficiency improvement measure that is applied towards improvement costs.*



## ***Raters MUST take an active role as the contracted party for the homeowner***

- *Tell your customer to call YOU if they have any questions about their rating, and follow up on your customers calls expeditiously.*
- *Tell your customers that they cannot participate in both the HERO and HELP Programs.*
- *Get W-9's signed upon initial visits, make sure only one name is on the form, that it is legible, and if the W-9 is for a business, PRINT the name of the signing person clearly below it, and give them a copy of the HERO Participant Letter.*
- *No one, other than a Certified Home Energy Rater, or a HERO Associate can discuss recommendations for improvements with the homeowner.*
- *No one, other than a Certified Home Energy Rater, can present HERO Program information to any organization, or group without obtaining prior approval from DNR. In addition, if you see printed, or hear radio, or tv advertisements about the HERO Program - inform DNR so that we can review it's content for accuracy. Report abuses of the HERO Program by either vendors or other raters to DNR.*
- *A Rater can not recommend any single vendor for work to be performed. If the home owner ask for suggested vendors, the rater MUST provide a minimum of three choices to the home owner instead of a single particular vendor (3 choices or no choices - unless only 1 vendor is available).*
- *Review with the homeowner, upon the initial visit, the copy of the HERO Participant letter, (p. 4) which lets them know that their home could be audited at any point over the next three years as a quality control check. It also explains to them how to access their rating information on our web site, as well as tax information about the rebate.*



## ***HERO Participant Letter***

***Must be presented  
to all participating  
clients upon  
your initial visit***

***Consist of 3 pages  
And will be updated  
To discontinue new homes  
In October of 2006***



KATHLEEN BABINEAUX BLANCO  
GOVERNOR

SCOTT A. ANGELLE  
SECRETARY

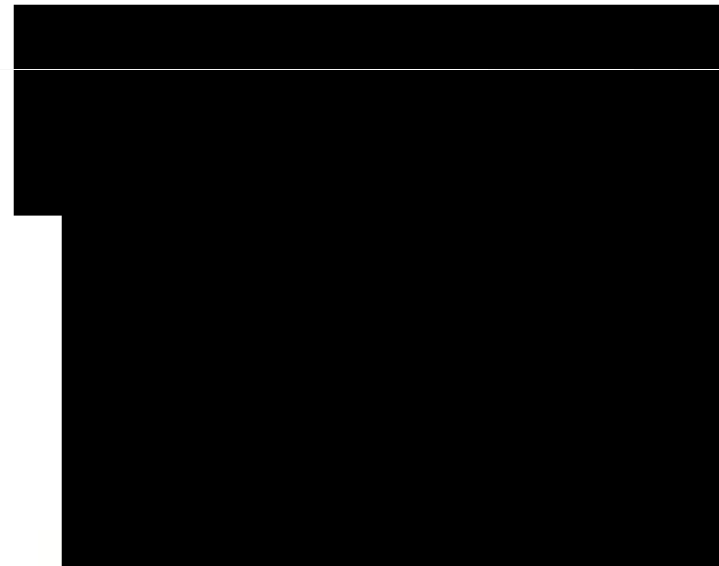
July 1, 2006

DEPARTMENT OF NATURAL RESOURCES  
OFFICE OF THE SECRETARY

Dear HERO Participant,

Congratulations on your decision to participate in the HERO Program. [REDACTED]  
[REDACTED] your participation in the HERO Program will benefit you, in saved utility bills  
and greater comfort, long after any rebate that you receive for making your home more energy efficient is gone.

Rules, guidelines, and procedures for the HERO Program are subject to change without notice. The guarantee that your home will be processed under the program only occurs once the Louisiana Department of Natural Resources receives a preliminary rating for your home, as submitted by a home energy rater that is listed on our website at the time of this preliminary. Your rebate will be based upon the guidelines that are in place at the time that the Louisiana Department of Natural Resources receives your preliminary rating.



OFFICE OF THE SECRETARY • TECHNOLOGY ASSESSMENT DIVISION • ENERGY SECTION  
P.O. BOX 44156 • BATON ROUGE, LOUISIANA 70804-4156 • PHONE (225) 342-1399 • FAX (225) 342-1397  
AN EQUAL OPPORTUNITY EMPLOYER



## HERO Participant Letter

*Must be presented to all participating clients upon your initial visit*

In order for **Existing Homes** to participate in the HERO Program, a preliminary rating of the existing home, as it is before improvements, **MUST** be conducted by the Home Energy Rater of your choice prior to any energy efficient improvements being made to the existing home. This preliminary rating of the existing home, as it is before improvements, **MUST** then be submitted to the Louisiana Department of Natural Resources by the Home Energy Rater. Existing Homes that do not meet this requirement are disqualified from participation in the HERO Program. An existing home qualifies for the HERO Program by being improved by 30% over the home as it was before the improvements were made however, if new HVAC equipment is installed as part of the improvements, in order for an existing home to qualify for the maximum \$2,000 rebate, the home must also meet the following requirements.

1. If any new HVAC equipment is installed, the HVAC equipment **MUST** be a minimum SEER 13 (this is a mandatory requirement - if the equipment efficiency is less than SEER 13 - the home does not qualify for HERO)
2. If the improvements to the home include a new HVAC system, the improvements made to the home must also obtain at least 2 Upgrade Points from the possible 12 Voluntary Items listed below. Obtaining any 6 Upgrade Points from the possible 12 Voluntary Items will qualify the home owner for the maximum \$2,000 rebate. If the improvements do not include any new HVAC equipment, none of the 12 Voluntary Upgrades are mandated and all that is required is the 30% increase in efficiency.

**Voluntary Items** (a detailed list will be provided to you by your energy rater)

1. New Duct System (6 Upgrade Points)
2. Seal and Insulate Chase (3 Upgrade Points)
3. Insulate Knee Walls (6 Upgrade Points)
4. Seal and Insulate Fire Place Opening in attic (3 Upgrade Points)
5. Air Tight Recessed Lighting Fixtures (3 Upgrade Points)
6. Seal and Insulate Attic Access Door (3 Upgrade Points)
7. Increase Attic Insulation (2 Upgrade Points for each additional R5)
8. Increase Wall Insulation (2 Upgrade Points for each additional R5)
9. Increase Heating System Efficiency (4 Upgrade Points)
10. Increase Water Heater Efficiency (3 Upgrade Points)
11. Window Upgrade (2 Upgrade Points for every 3 additional windows)
12. Upgrade Package - Programmable Thermostat, R8 Water Heater Jacket, and Occupancy Sensors (2 Upgrade Points)

*Note : Refer to detailed list in order to meet specific criteria for individual Voluntary Items*

- The homeowner must provide valid receipts for all of the energy improvements, to the energy rater at the time of the final rating

If your home is a pre-existing home - your rebate will be determined by either multiplying your home energy rating's energy efficiency premium by 20%, or by multiplying the cost of the energy efficiency improvements you make to the home by 20% - whichever is the lesser of the two. Your rebate will be the result of this calculation, up to a maximum of \$2,000. Your cash rebate amount currently will be taxable, though we have applied to the IRS for a declaration that this award be nontaxable. Should the IRS reverse their decision on taxing this cash rebate, you will not receive a 1099 for this rebate amount in the upcoming tax season. Please save this notification with your tax information for the upcoming tax season. If you have any questions, please call us at (225) 342-1399 or (800) 836-9589. Please visit our web site, for an explanation of the HERO Program, and step by step instructions on how to participate in the program, at:



## HERO Participant Letter

*Must be presented  
to all participating  
clients upon  
your initial visit*

<http://dnr.louisiana.gov/sec/execdiv/techasm/programs/residential/hero/instructions.htm>

Once your home energy rating has been submitted to the Department of Natural Resources by your rater, you can monitor the status of your application through the HERO system by going to :

[http://sonris-www.dnr.state.la.us/www\\_root/sonris\\_portal\\_1.htm](http://sonris-www.dnr.state.la.us/www_root/sonris_portal_1.htm)

clicking on the lighthouse at the top of the screen, and then clicking on "Homeowner/Builder Inquiry" and entering your social security number and last name. Please take advantage of this feature to keep yourself abreast of the status of your application through the system. By participating in this program you consent to a possible follow up rating audit within a three year period from the time of the rebate check date. You will be notified in advance, to schedule a time at your convenience, should your home be randomly selected for such an audit.

Thanks,

Buddy Justice  
Environmental Consultant  
Energy Rated Homes of Louisiana  
Louisiana Department of Natural Resources

HBJ/dkb

Enclosure

\_\_\_\_\_  
(Homeowner Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Rated Property Address)

LA  
\_\_\_\_\_  
(City)

\_\_\_\_\_  
(Zip)




# HERO Participant Letter

*Must be presented  
to all participating  
clients upon  
your initial visit*

*Now you must have the home owner sign, and date the 3<sup>rd</sup> page that will be scanned and sent into DNR with the preliminary (only 3<sup>rd</sup> page needs to be scanned and submitted to DNR)*

*State of Louisiana*



KATHLEEN BARNES/ALAN BLANCO  
GOVERNOR

SIOBHAN A. ANGELLE  
SECRETARY

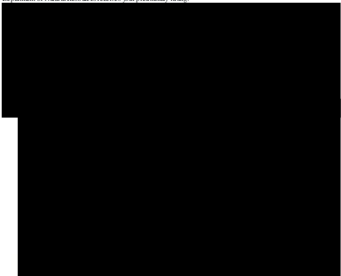
July 1, 2006

DEPARTMENT OF NATURAL RESOURCES  
OFFICE OF THE SECRETARY

Dear Herndon Park riparian,

Congratulations on your decision to participate in the HERO Program. Whether your home will be a newly built or an existing home, your participation in the HERO Program will benefit you, in several ways: bills will be lower, your energy use will be more efficient, and you will be helping the environment.

Rules, guidelines, and procedures for the HERO Program are subject to change without notice. The participant that you have will be processed under the program only according to the Louisiana Department of Natural Resources' preliminary ruling for your home, as reflected by a home energy meter that is installed on your website at the time of the performance. Your rebate will be based upon the guidelines that are in place at the time that the Louisiana Department of Natural Resources receives your performance rating.



OFFICE OF THE SECRETARY • 100 N. GULF BLVD. • SUITE 100 • METairie, LA 70002  
P.O. BOX 44810 • BASTION ROUGE, LOUISIANA, 70044-0110 • PHONE: (504) 292-2700 • FAX: (504) 292-1397  
WWW.DNR.LA.GOV

Page 1

In order for **Exiting Homes** to participate in the Home Energy Program, a participant must complete the existing home, as it is before improvements. MUST be conducted by the Home Energy Program, or if those doing prior to improvements, it must be documented before improvements begin to the existing home. This preliminary survey of the existing home, as it is before improvements, MUST be done by the Home Energy Program, or if those doing prior to improvements, it must be documented before improvements begin. **Exiting Homes**, that do not meet the requirement are disqualified from participation in the Home Energy Program.

An existing home qualifies for the Home Energy Program by being a minimum efficiency 30% over the home as it was before the improvements were made; however, if new HVAC equipment is installed, the home must also meet the following equipment list:

1. If any new HVAC equipment is installed, the HVAC equipment MUST be a minimum SEER 13 (this is the minimum requirement - if the HVAC equipment is only 12 or less, it must be SEER 13 and not only for HEER) .
2. If the improvements to the home include a new HVAC system, the improvements must be to the home that are obtained at least 12 months prior to the start of the 12 Voluntary Items listed below. Obtaining any 5 Upgrade Points from the new HVAC system will qualify the home owner for the minimum 32.00% rebate. If the improvements do not include any new HVAC equipment, one of the 12 Voluntary Items are mandated and that is required to meet the 30% increase in Efficiency.

**Voluntary Items (in default will be provided to you by your energy auditor)**

1. New Dual Siding (2 Upgrade Points)
2. Sidel and Siding (each 1 Upgrade Point)
3. Insulate Knee Walls (1 Upgrade Point)
4. Sidel and Siding (each 1 Upgrade Point)
5. Sidel and Siding (each 1 Upgrade Point)
6. Sidel and Siding (each 1 Upgrade Point)
7. Insulate Knee Walls (2 Upgrade Points for each wall/ceiling R7)
8. Insulate Wall Breakouts (2 Upgrade Points for each wall/ceiling R7)
9. Increase Heating System Efficiency (2 Upgrade Points)
10. Increase Water Heater Efficiency (2 Upgrade Points)
11. Window Upgrade (2 Upgrade Points for every 1/4 inch double window)
12. Upgrade Package - Programmable Thermostat, R18 Water Heater Jacket and Occupancy Sensor (2 Upgrade Points)

**Note - Return to default in order to meet specific criteria for Individual Voluntary Items**

1. The homeowner must provide valid receipts for the energy improvements, as the energy meter at the time of the default.

If you have a pre-existing home, your energy will be determined by your energy auditor, your energy efficiency program year 2019, or by multiplying the cost of the energy efficiency improvements you make to the home by 2019 - whichever is the lesser of the two. Your decision will be based on this calculation, or a maximum of \$2,000. If your annual energy amount is within the table, you will be eligible for the IRS tax deduction that this would be made only. Should the IRS receive their notice of return this calculation, you will not receive a 1099 for this value, unless in the following year you receive a 1099 for this value. Your tax information for the upcoming tax season. If you have any questions, please call us at (252) 341-1231 or email k3@nc-herp.org. Please valid our work with you, for a detailed tax form, and help us sign instructions on how to complete the program, at:

Page 2

<http://dnr.louisiana.gov/sec/execute/ehasml/programs/residential/hero/instructions.htm>

Once your home energy rating has been submitted to the Department of Natural Resources by your rater, you can monitor the status of your application through the HERO system by going to:

[http://sonris-www.dnr.state.la.us/www\\_root/sonris\\_portal\\_1.htm](http://sonris-www.dnr.state.la.us/www_root/sonris_portal_1.htm)

clicking on the lighthouse at the top of the screen, and then clicking on "Homeowner/Builder Inquiry" and entering your social security number and last name. Please take advantage of this feature to keep yourself abreast of the status of your application through the system. By participating in this program you consent to a possible follow up rating audit within a three year period from the time of the rebate check date. You will be notified in advance, to schedule a time at your convenience, should your home be randomly selected for such an audit.

Thanks,

Buddy Justice  
Environmental Consultant  
Energy Rated Homes of Louisiana  
Louisiana Department of Natural Resources

HBJ/dlb

Enclosure

*John Doe* *1/5/2004*  
(Homeowner Signature) (Date)

*123 A Street* *Some where* *LA 71111*  
(Rated Property Address) (City) (Zip)

Page 3







## WHO IS ELIGIBLE FOR A HERO REBATE

*(DNR will only issue a rebate check to an eligible applicant)*

- *ONLY residents of Louisiana can receive a HERO Rebate (must reside in the state of Louisiana)*
- *ONLY SINGLE and EXISTING TWO FAMILY (duplex) residences located within the state of Louisiana can receive a HERO Rebate*
- *On ~~new and~~ existing homes a rebate can only go to the property owner at the time of the preliminary rating. ~~On new homes, the recipient must be the owner occupant of the property at the time of the final rating.~~ On both new and existing homes the rating documentation is non transferable from the preliminary rating to the final rating*
- *A rated property can only go through the HERO Program one time (no repeats of a rated address)*
- *~~An individual can participate in the HERO Program on a one time only basis for new homes (one time participation per individual)~~*
- *Owners of Existing Homes can receive a HERO Rebate on a maximum of 4 different existing properties, or a combination of 3 different existing properties and one new property (as long as the new property participating is owner occupied by the rebate recipient at the time of the final rating)*
- *~~New and existing home applicants must be an individual and can only apply for the program under their personal name and Social Security Number (NO LLC., CORP., INC., BUSINESS, or PARTNERSHIP - with the exclusion of non-profits)~~*
- *Both sides of an existing duplex can only go through the HERO Program if they are done at the same time (new duplexes are disallowed under the HERO Program)*
- *A home energy rater is not allowed to rate or have another rater rate his/her own property under HERO*



## WHO IS ELIGIBLE FOR A HERO REBATE

(DNR will only issue a rebate check to an eligible applicant)

Cont.

Non-profit organizations can participate in the HERO Program under the following guidelines:

- Only homes that are owner occupied at the time of construction completion can participate
- Local chapters can participate a maximum of 10 homes per calendar year per chapter
- The rebate will be based on 10% of the Energy Efficiency Premium
- All new home guidelines must be followed in order for the home to participate

If the builder is building a CUSTOM Home for a Home Buyer who owns the property at the time of construction - the rebate must go to the Home Buyer).

THE REBATE CAN ONLY GO TO WHOEVER OWNS THE PROPERTY AT THE TIME OF IMPROVEMENT (on Existing Homes) OR THE OWNER OCCUPANT OF THE PROPERTY AT THE TIME OF CONSTRUCTION COMPLETION (on New Homes)

THE REBATE CAN NEVER GO TO A BUILDER, CONTRACTOR OR SUB-CONTRACTOR, SUCH AS AN HVAC, ELECTRICAL, FRAMING, ROOFING, OR INSULATION CONTRACTOR



## HERO Operations Manual

### Form W-9

**Name of the Person submitting the W-9  
ONLY ONE PERSON'S NAME SHOULD  
BE HERE AS IT OFFICIALLY APPEARS IN  
CONNECTION WITH THE PROVIDED SSN -**

**not Jonathan and Mary Doe  
For businesses - a person's name does not have  
to be provided HERE (unless sole proprietor)  
BUT SOME ONE MUST SIGN IT HERE  
And PLEASE PRINT NAME LEGIBLY AFTER**

**If for a business fill in this blank  
If for an individual leave this blank**

**Check the appropriate box here**

**Address where CHECK is to be sent**

**If furnishing a SSN fill it in HERE**

**If furnishing a EIN fill it in HERE**

**Individual Signs it - Prints the name that  
is signed next to it - and dates it HERE**

Form **W-9**  
(Rev. November 1999)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer  
Identification Number and Certification**

Give form to the requester. Do NOT send to the IRS.

Name (If a joint account, you changed your name, see Specific Instructions on page 2.)  
**Jonathan Doe**

Business name, if different from above. (See Specific Instructions on page 2.)  
**Very Good Ratings, Inc.**

Check appropriate box: ☐ Individual/Sole proprietor ☐ Corporation ☐ Partnership ☐ Other

Address (number, street, and apt. or suite no.)  
**1234 Check Mailing Street, Suite 5**  
City, state, and ZIP code  
**City In, LA 77777**

Requester's name and address (optional)

List account number(s) here (optional)

**Part I Taxpayer Identification Number (TIN)**  
Enter your TIN in the appropriate box. For individuals, this is your social security number (SSN). However, if you are a resident alien OR a sole proprietor, see the instructions on page 2. For other entities, it is your employer identification number (EIN). If you do not have a number, see **How to get a TIN** on page 2.  
**Note:** If the account is in more than one name, see the chart on page 2 for guidelines on whose number to enter.

Social security number  
**1 2 3 4 5 6 7 8 9**  
OR  
Employer identification number  
**72 1 2 3 4 5 6**

**Part II For Payees Exempt From Backup Withholding** (See the instructions on page 2.)

**Part III Certification**  
Under penalties of perjury, I certify that:  
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and  
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.  
**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. (See the instructions on page 2.)

Sign Here Signature **Jonathan Doe** Date **1/17/2003**

**Purpose of form.** A person who is required to file an information return the IRS must get your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you acquire or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.  
Use Form W-9, if you are a U.S. person (including a resident alien), to give your correct TIN to the person requesting it, and, when applicable, to:  
1. Certify the TIN you are giving is correct (or you are waiting for a number to be issued),  
2. Certify you are not subject to backup withholding, or  
3. Claim exemption from backup withholding if you are an exempt payee.  
If you are a foreign person, IRS prefers you use a Form W-8 (certificate of foreign status). After December 31, 2000, foreign persons must use an appropriate Form W-8.  
**Note:** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

What is backup withholding? Persons who do not certify to the requester that they are not subject to backup withholding may be subject to backup withholding if:  
1. You do not furnish your TIN to the requester, or  
2. You do not certify your TIN when required (see the Part III instructions on page 2 for details), or  
3. The IRS tells the requester that you furnished an incorrect TIN, or  
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or  
5. You do not certify to the requester that you are not subject to backup withholding.

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.  
**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.  
**Criminal penalty for falsifying information.** Willfully falsifying certification or affirmations may subject you to criminal penalties including fines and/or imprisonment.  
**Misuse of TINs.** If the requester discloses or uses TINs in violation of Federal law, the requester may be subject to civil and criminal penalties.

Cat. No. 10231X Form **W-9** (Rev. 11-99)

**Ph # (555) 555-5555 Caddo Parish**



## ***IMPORTANT INFORMATION (about Form W9's)***

*With a preliminary, you MUST submit a W-9 showing the expected mailing address that will be valid at the time of the final. You MUST verify with the home owner, at the time of the final, that the mailing address is still valid. If the mailing address is no longer valid at the time of the final - you MUST re-submit a NEW revised W-9 with the final, and mark CHANGED next to the W9 block on the HERO Cover Sheet.*

*THIS MEANS THAT IF YOU MUST RE-SUBMIT A W-9 - THE RATER CAN NOT MODIFY THE ORIGINAL W-9 THAT WAS SUBMITTED. THE RATER MUST HAVE A NEW W-9 FILLED OUT AND SIGNED BY THE HOME OWNER. ANY MODIFICATION OF A FORM W-9 (such as whiting out the address on the original W-9, filling out the new address and re-submitting it) IS CONSIDERED AN ACT OF FRAUD BY STATE GOVERNMENT, THEREFORE DNR CAN NOT ACCEPT A W-9 THAT HAS BEEN ALTERED OR MODIFIED (The time to get this revised W-9 filled out is when you are at the residence conducting the final. Be prepared by always having blank W-9's on hand so you will not have to waste another trip to the home to get this filled out later if a revised form is needed.)*

***W9 MUST now be faxed to  
225-242-3301 instead of  
e mailed as in the past***





## ***IMPORTANT INFORMATION (about naming your e-mails)***

*The SONRIS CO Number is required on all final submittals and can be found under Rater's Inquiry in the HERO Application Status section of the DNR's website. Before you send in a final rating you must go to SONRIS on DNR's web site and include the CO Number in the e-mail subject line along with the other information lined out below.*

***Examples of subject lines contained in rating submittals:  
(see pp 69-73 to recover CO Number for Finals)***

*Preliminary Example: (Subject box of e-mail from Rodney Bell)*

*R. Bell, Jones, Harry 1234 Rocky Road - P*

*or R. Bell, Jones, H. 1234 Rocky Rd - P*

*Preliminary Example: (Subject box of e-mail from Bill Haley)*

*B. Haley, Smith, John 4567 Pleasant Valley Road - P*

*or B. Haley, Smith, J. 4567 Pleasant Valley Rd - P*

*Final Example: (Subject box of e-mail from Rodney Bell)*

*CO9275, R. Bell, Jones, Harry 1234 Rocky Road - F*

*or CO9275, R. Bell, Jones, H. 1234 Rocky Rd - F*

*Final Example: (Subject box of e-mail from Bill Haley)*

*CO8926, B. Haley, Smith, John 4567 Pleasant Valley Road -F*

*or CO8926, B. Haley, Smith, J. 4567 Pleasant Valley Rd - F*



## ***IMPORTANT INFORMATION (about labeling your electronic file submittals)***

*Please label all of you electronic file attachments with the following suffix's (can be either upper or lower case) :*

<i>HERO Cover Sheet for preliminary</i>	<i>- CSP</i>
<i>HERO Cover Sheet for final</i>	<i>- CSF</i>
<i>1119 preliminary</i>	<i>- 1119P</i>
<i>1119 final</i>	<i>- 1119F</i>
<i>W9</i>	<i>-W9</i>
<i>Economic Summary preliminary</i>	<i>- ESP</i>
<i>Economic Summary final</i>	<i>- ESF</i>
<i>Energy Cost &amp; Features Report preliminary</i>	<i>- ECFP</i>
<i>Energy Cost &amp; Features Report final</i>	<i>- ECFF</i>
<i>Certificate of Completion</i>	<i>- CC</i>
<i>Receipts</i>	<i>- R</i>
<i>Weighted useful life calculation</i>	<i>- WUL</i>
<i>Building File preliminary proposed (for new and existing home)</i>	<i>- BLGP</i>
<del><i>Building File final (for new home)</i></del>	<del><i>- BLGF</i></del>
<del><i>Building File 80 point (for new home)</i></del>	<del><i>-BLG80</i></del>
<i>Building File existing (for existing home)</i>	<i>-BLGEX</i>
<i>Building File improved (for existing home)</i>	<i>- BLGIMP</i>



## *More IMPORTANT INFORMATION (about labeling your electronic file submittals)*

### *Labeling Examples :*

*Preliminary Examples: (from Rodney Bell)*

<i>HERO Cover Sheet for preliminary</i>	<i>= JonesHarry1234RockyRoadCSP</i>
<i>or</i>	<i>JonesH1234RockyRoadCSP</i>
<i>1119 preliminary</i>	<i>= JonesH1234RockyRoad1119P</i>
<i>W9</i>	<i>= JonesH1234RockyRoadW9</i>
<i>Economic Summary preliminary</i>	<i>= JonesH1234RockyRoadESP</i>
<i>Energy Cost &amp; Features Report preliminary</i>	<i>= JonesH1234RockyRoadECFP</i>
<i>Building File preliminary proposed</i>	<i>= JonesH1234RockyRoadBLGP</i>
<i>Building File existing (for existing home)</i>	<i>= JonesH1234RockyRoadBLGEX</i>

*Final Examples: (from Rodney Bell)*

<i>HERO Cover Sheet for final</i>	<i>= JonesHarry1234RockyRoadCSF</i>
<i>or</i>	<i>JonesH1234RockyRoadCSF</i>
<i>1119 final</i>	<i>= JonesH1234RockyRoad1119F</i>
<i>W9</i>	<i>= JonesH1234RockyRoadW9</i>
<i>Economic Summary final</i>	<i>= JonesH1234RockyRoadESF</i>
<i>Energy Cost &amp; Features Report final</i>	<i>= JonesH1234RockyRoadECFF</i>
<i>Building File improved (for existing home)</i>	<i>= JonesH1234RockyRoadBLGIMP</i>
<i>Building File existing (for existing home)</i>	<i>= JonesH1234RockyRoadBLGEX</i>



## IMPORTANT INFORMATION (about **HERO Associates**)

*(In order for a person to become certified as a Louisiana HERO Home Energy Rater: )*

- You must have successfully completed the "Qualifying Procedures" which includes owning a complete set of the required equipment
- If you complete all of the requirements other than the purchase of the required equipment - You may work with a certified rater but will not be allowed to submit ratings for the HERO Program under your name, nor will your name be posted on DNR's web site until you complete all of the "Qualifying Procedures" which includes owning your own set of equipment. While working with a certified rater, as a **HERO Associate**, a **HERO Associate** will receive credit for all of the ratings submitted by the Certified Rater that he/she is **Associated** with, but all of the ratings submitted will be submitted under the certified raters name. The certified rater will be the one ultimately held responsible for the ratings.
- All individuals that are certified to work within the HERO Program, as either Certified or as an **Associate**, must carry and present a valid and current Rater ID Badge to home owners, and home builders while performing HERO related work on any residence. HERO related work refers to consultation, software entry, and mechanical testing of the home.
- YOU CAN NOT BE CERTIFIED AS A LOUISIANA HERO HOME ENERGY RATER, OR AN ASSOCIATE, IF YOU ARE ACTIVELY CONDUCTING BUSINESS OR EARNING INCOME FROM ANY OF THE GOODS OR SERVICES THAT THE HERO PROGRAM BASES IT REBATE UPON.

THESE INCLUDE : (but are not limited to)

1. HVAC Contractor
2. Insulation Contractor
3. Window Distributor
4. Water Heater / Appliance Distributor
5. Infiltration Control Services Provider
6. Lighting Distributor
7. Energy Efficiency Equipment Sales or Products





## ***IMPORTANT INFORMATION (about maintaining your active status)***

*(Raters that are listed as active on our web site - in order to remain listed :)*

- You must conduct at least 3 ratings every 6 months*
- IF YOU DO NOT - You will still be certified, but will be removed from the web site until you conduct the 3 ratings*

***THE ABOVE IS TRUE AS LONG AS YOU HAVE CONDUCTED AT LEAST 1 RATING OVER THE PAST 1 YEAR***

- If you have gone, or go for 1 year without conducting a single rating - you will be removed from the web site and also loose your active status*
- In order to recover your active status - you must conduct a series of training ratings (2 to 3) that will be submitted to DNR for review. Once reviewed - you must conduct an additional training rating that will be observed by DNR*

***IN ADDITION TO THE ABOVE REQUIREMENTS, YOU MUST ALSO ATTEND ONE  
OF THE ANNUAL RATER MEETINGS IN ORDER TO MAINTAIN YOUR ACTIVE STATUS***



## Rater Code of Ethics

**This document must be renewed annually and kept on file at DNR**

*You must print your name here*

*Sign it here*

*and date it here*



M.J. "MIKE" FOSTER, JR.  
GOVERNOR



JACK C. CALDWELL  
SECRETARY

### DEPARTMENT OF NATURAL RESOURCES

#### Energy Rated Homes of Louisiana Energy Rater Code of Ethics

Honesty, justice and courtesy form a moral philosophy which, associated with mutual interest among people, constitutes the foundation of ethics. The rater should recognize such a standard, not in passive observance, but as a set of dynamic principals guiding their conduct. It is their duty to practice the profession according to this code of ethics.

As the keystone of professional conduct is integrity, the raters will discharge their duties with fidelity to the public, their clients, and with fairness and impartiality to all. They should uphold the honor and dignity of the profession and avoid association with any enterprise of questionable character, or apparent conflict of interest.

1. The rater will make statements only when they are based upon facts supported by the rating or by research done by an industry recognized professional source. The rater will not recommend fuel switching. However, if asked by the client to calculate "what if" scenarios with different fuel types, the rater shall comply with the client's request.
2. The rater will always act in good faith toward each client. The rater will not perform improvement work on a home the rater rates. Nor shall the rater rate a home on which the rater has done the improvement work.
3. The rater will not disclose any information concerning the results of the rating to any third party, outside ERHL, without the written approval of the clients or their representative.
4. The rater will not accept compensation, financial or otherwise, from more than one interested party for the same service.
5. The rater will not accept nor offer commissions, payment, or allowances directly from or to other parties dealing with their client in connection with work for which the rater is responsible.
6. The rater will promptly disclose to his client any interest in a business which may affect the client. The rater will not allow an interest in any business to affect the quality or results of the rating which they may be called upon to perform. The rating may not be used, by the rater, to deliberately obtain prophet from the work recommended to the client, or obtain additional work in another field.
7. A rater shall make every effort to uphold, maintain and improve the professional integrity, reputation and practice of Energy Rated Homes of Louisiana and its certified raters. The rater will report all such relevant information, including violations of this Code by other members, to energy Rated Homes of Louisiana for possible remedial action.

I John Rater, have read this "Rater Code of Ethics" and  
(Print Energy Raters Name)

understand that any violation of this Code could result in possible criminal proceedings.

John Rater  
(Energy Raters Signature)

Jan. 1, 2006  
(Date)

OFFICE OF THE SECRETARY • TECHNOLOGY ASSESSMENT DIVISION • ENERGY SECTION  
P.O. BOX 44156 • BATON ROUGE, LOUISIANA 70804-4156 • PHONE (225) 342-1399 • FAX (225) 342-1397  
AN EQUAL OPPORTUNITY EMPLOYER



## *Rating Audits*

*DNR conducts audits on homes that have gone through the HERO Program during the summer of every year*

- DNR reviews the electronic building files and associated required documentation on every preliminary and final rating submitted. DNR will now conduct blower door tests on randomly selected homes as part of its yearly audit*
- Every rater that has conducted at least one rating in the previous calendar year will have that one home field audited. Raters conducting more than 1 rating in the previous calendar year will have a minimum of 1% of their homes field audited. Raters with higher volumes could have a higher percentage of their homes field audited.*
- If our findings are more than 10% off from your submitted rating documentation, you will be asked to justify the discrepancy*
- If there are blatant errors, such as showing Low-E Argon Windows with less efficient windows installed, or higher SEER ratings than what is actually installed - a more dramatic approach will be taken (see Rater Ethics p.9)*
- You must keep, and submit copies of receipts for the work done on every existing home for auditing purposes. Included with the home audits are rater record audits*



# Rating Audits

You must provide verified proof that your equipment is factory calibrated on a yearly basis

You will have an evaluation performed on your rating competency on a yearly basis

Documentation of raters customer file audits and audits of homes rated by individual raters

Documentation of approved CEU's

## ERHL Home Energy Rater Audit Form

Year 2006

Rater's Name \_\_\_\_\_

Number of Homes Rated this year \_\_\_\_\_

Rater ID # ERHL# 20??-???

Number of Homes to be Audited this year \_\_\_\_\_

### Field Observations

<u>Equipment Calibration</u>	Date	Verified by:
Blower Door		
Guages		
Meters		

<u>Rating Observation</u>	Date	Verified by:
HO Councilitation		
Blower Door Test		
Duct Leakage Test		

### Rating Files

CO #	Date	blg file	1119	Pers. List	Receipts	Tax Letter	Software	Verified by

### Home Audits

CO#	Date	1119	Pers. List	Tax Letter	Rated SEER	Blower Door Test	Verified by

### RESNET Approved CEU's

Unit #	Date	Session Name	Related Field



## *When MUST the Rating be performed on an EXISTING HOME?*

***Preliminary Rating** – MUST be performed prior to any improvements being made to the home*

- If the home is not rated before the improvements are made – the home can not participate in the HERO Program*
- Money for the existing home is allocated upon receipt of the Preliminary Rating*

***Final Rating** – MUST be performed after the improvements have been made to the home.*



## *When MUST the Rating be performed on a NEW HOME?*

***Preliminary Rating*** - MUST be performed during the planning stage of construction prior to the slab being poured

- If the home is not rated during the planning stage (before the slab is poured)- the home can not participate in the HERO Program
- The amount of funding for new homes is allocated upon receipt of the Preliminary Rating

***Final Rating*** - MUST be performed after all of the home construction is completed.



## ***When MUST the Preliminary Rating be turned in on an EXISTING HOME?***

- WITHIN TWO WEEKS OF COMPLETION***
- ALL PRELIMINARIES MUST NOW BE SUBMITTED AND ON FILE WITH DNR BEFORE A FINAL CAN BE SUBMITTED***

***(It is a good idea to check the web site about 3 weeks after submitting a preliminary to be assured that we have received and posted the rating so that there will be no problems when you submit the final later.)***



*When MUST the Preliminary Rating be turned in  
on a NEW HOME?*

- *WITHIN TWO WEEKS OF COMPLETION*
- *PRELIMINARIES MUST NOW BE SUBMITTED AND ON FILE  
WITH DNR BEFORE A FINAL CAN BE SUBMITTED*

*(It is a good idea to check the web site about 3 weeks after  
submitting a preliminary to be assured that we have received and  
posted the rating so that there will be no problems when you submit  
the final later.)*





## *How is money allocated for homes participating in the HERO Program?*

- *Money for ~~new and~~ existing homes is allocated upon receipt of the Preliminary Rating*
- *This money is allocated to the rating for 6 months*
- *After 6 months, if the final rating has not been completed – this allocated money will be returned to the general HERO Fund for reallocation*
- *Three weeks prior to this 6 month date, IF FUNDING IS STILL AVAILABLE AT THAT TIME, the allocation can be extended for a maximum of 3 months with a call to DNR from the energy rater (after this date the money for this rating is no longer allocated or guaranteed)*
- *In order for a home, that has lost it's allocation, to finalize participation in the HERO Program – all information, and forms from the final rating must be submitted and, if funds are available at that time, the home will be re-allocated funds*



*What **MUST** the Customer receive  
from the Rater to make up a  
MINIMUM PRELIMINARY RATING  
on an **EXISTING HOME**?*

*Preliminary Rating - (upon preliminary visit, or within 2 weeks of preliminary visit)*

*Blower Door Test Results w/ASHRAE Standard 152 Duct Leakage Results*

*List of recommendations for improvement*

*Preliminary Form 1119 (home as is compared to recommended improved home)*



HERO Operations

Ne

## Procedures for entering Std. 152 duct leakage into REMRate 12

(Each system must have this same procedure conducted on it separately)

1. With the ducts un-taped - turn on the air handler with ac heat/cool off and the air filter in place.
  - a. Take a pressure reading in 3 supply ducts (1 nearest return, 1 farthest from return and 1 mid way) average the 3 readings and enter the reading into 1a
  - b. Take a pressure reading in the return duct (if the system has more than 1 return duct - take a reading in all of the returns and average them) enter the average pressure reading if system has single return, or the average if the system has more than 1 return into 1b
2. With the ducts taped - be sure the air handler is turned off. Connect a Blower Door to the house, and connect a Duct-Blaster to the return duct system. Pressurize the house to 25 Pa. using the Blower Door. While the house is @ 25 Pa., pressurize the duct system to 25 Pa. using the Duct-Blaster sampling the duct pressure inside the duct system at a location not at the Duct-Blaster.

While both the house and duct system are @ 25 Pa. :

### Un-Vented Attics

- a. The supply ducts are inside conditioned space therefore 0 Pa. enter into 2a
- b. The return ducts are inside conditioned space therefore 0 Pa. enter into 2b
- c. Take a total flow reading on the Duct-Blaster fan and enter the reading into 2c

### Vented Attics

- a. Take a pressure reading in the attic where the supply ducts are located using the outside as the reference (same reference as for the Blower Door) and enter the reading into 2a. If the supply and return ducts are in the same attic this same pressure reading will be entered into both 2a. and 2b
- b. Take a pressure reading in the attic where the return ducts are located using the outside as the reference (same reference as for the Blower Door) and enter the reading into 2a. If the supply and return ducts are in the same attic this same pressure reading will be entered into both 2a. and 2b
- c. Take a total flow reading on the Duct-Blaster fan and enter the reading into 2c

ASHRAE Standard 152 Duct Leakage

Annex B - Leakage to Outside

Supply / Return Total

Duct Leakage at 25 Pa (cfm): 0 0 515

Average Delta Pressure Buffer/Outside (Pa): 0.0 0.0

Average Operating Duct Pressure (Pa): 4.6 16.0

Annex C - Total Duct Leakage (10% Max)

Annex A Measured Air-Handler Fan Flow (cfm): 0 Default

Delta Pressure Across Air-Handler Fan (Pa): 125.0 Default

Total Measured Duct Leakage at 25 Pa (cfm): 0

Air Handler Installed: ☐ 0

Register Grilles Installed: ☐ 0

Total Adjusted Duct Leakage (cfm): 0

OK Cancel Help

Click "Total"

Reading 2a from above

Reading 2c from above

Reading 2b from above

Reading 1a from above

Reading 1b from above



*What **MUST** the Customer receive  
from the Rater to make up a  
MINIMUM FINAL RATING  
on an **EXISTING HOME**?*

***Final Rating** - (upon final visit, or within 3 weeks of final visit)*

*Final Form 1119 (preliminary home compared to completed improved home)*

*Two Building Economic Summary*

*Two Building Energy Cost and Feature Report*

*Blower Door Test Results w/ASHRAE Standard 152 Duct Leakage Results*



## *What MUST the Customer receive from the Rater to make up a MINIMUM PRELIMINARY RATING on an NEA HOME?*

*Preliminary Rating - (given preliminary visit prior within 2 weeks of preliminary visit)*

*List of recommendations for improvement*

*Preliminary Form 1219 (80 point home compared to recommended improved home)*

*Preliminary Form 1219d (80 point home compared to home as designed) (optional)  
(at least a minimum of the bldg. file for the as designed home submitted to DNR)*



## What **MUST** the Customer Receive from the Rater to make up a MINIMUM FINAL RATING on an NEHB HOME?

**Final Rating** (upon final visit, or within 3 weeks of final visit)

Form 1119 (80 point home compared to as built home)

Two Building Economic Summary

Two Building Energy Cost and Feature Report

Blower Door Test Results w/ASHRAE Standard 152 Duct Leakage Results



*Effective  
October 1, 2006  
ALL EXISTING  
HOME RATINGS  
MUST BE  
PERFORMED IN  
REM/Rate Ver.12+*

# REM/Rate<sup>TM</sup>

## *The* Home Energy Rating Tool

*Version 9.0 to 11.43*

*HERS Score = 0 to 100 point  
Range*

*Code Reference = 95 MEC*

*Reference Home = 80 point*

*Higher Score = More Efficient*

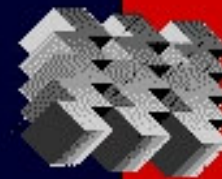
*Version 12.0 and above*

*HERS Index = 0 to 500 point  
Range*

*Code Reference = 2004 IECC*

*Reference Home = 100 point*

*Lower Score = More Efficient*



ARCHITECTURAL ENERGY  
CORPORATION  
*Integrated Engineered Solutions*





## HERO Form 1119

# Rating Info. on Existing Homes

for the Preliminary  
Submit to DNR within 2 weeks  
Home Owners Name

Rated Address

House as is at rating  
before improvements

From Quick Analysis  
for Current Rating  
house

Raters Proposed rating  
after his/her  
RECOMMENDATIONS

From Quick Analysis  
for proposed house  
after IMPROVEMENTS

Pre-Improvement Energy Cost  
- Post Improvement Energy Cost  
Estimated Annual Energy Savings

All existing home ratings now  
conducted in REM/Rate Ver. 12+

Energy Rated Homes of Louisiana		Rating Status	
certifies that the home of <u>Mary Case</u> located at:		Preliminary	<input checked="" type="checkbox"/>
		Final	<input type="checkbox"/>
		New	<input type="checkbox"/>
		Existing	<input checked="" type="checkbox"/>
		(New Preliminary is from PLANS)	

Current Rating	Estimated Annual Pre-Improvement Energy Costs	Rating After Improvement	Estimated Annual Post-Improvement Energy Costs	Estimated Annual Energy Savings
159.6	\$2,300	129	\$1,500	\$800

Actual use and cost may vary from this estimate depending on occupants use and weather conditions and utility rates in effect at the time.

Least Efficient	==<200 & >150	==<150 & >100	==<100 & >85	==<85 & >70	==<70 & >50	==<50 & >=0	Most Efficient
***	***+	****	****+	*****	*****	*****+	

Suggested Improvement Recommendations					
Existing	Recommended <input type="checkbox"/>	Estimated <input type="checkbox"/>	Annual Savings	Measure	Lifetime
	/ Installed <input type="checkbox"/>	/ Actual Cost <input type="checkbox"/>			
Ceiling Insulation					
Wall Insulation					
Floor Insulation					
Windows					
Air Leakage					
Water Heater					
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
<b>Total Package</b>					

Information for Lenders and Appraisers	
Installed Cost of Improvements	
Weighted Life of Measures	
Present Value Discount Rate	
Present Value Factor (PVF)	
Expected Monthly Mortgage Costs	
Expected Monthly Energy Savings	
Expected Annual Energy Savings	
Expected Annual Maintenance	
Net Annual Savings (NAS)	
<b>Energy Efficiency Premium</b>	

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.

FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

Home Owner Signature \* :  
Energy Rater Signature:  
Date of Rating:  
\* Home Owner Signature required only on Finals

form 1119.doc / ERHLForm1119 12/06





## HERO Form 1119

### Determining Equipment Efficiencies

### Using REMRate's Defaults

**All existing home ratings now  
conducted in REM/Rate Ver. 12+**

Energy Rated Homes of Louisiana		Rating Status																																																									
certifies that the home of <u>Mary Case</u> located at:		Preliminary <input checked="" type="checkbox"/>	Final <input type="checkbox"/>																																																								
<u>123 Home Street</u> <u>Any Place,</u> <u>LA</u> <u>77777</u>		New <input type="checkbox"/>	Existing <input checked="" type="checkbox"/>																																																								
Address City State Zip		(New Preliminary is from PLANS)																																																									
has been rated using the Uniform Energy Rating System.																																																											
Current Rating	159.6	Estimated Annual Pre-Improvement Energy Costs	\$2,300	Rating After Improvement	144	Estimated Annual Post Improvement Energy Costs	\$1,500	Estimated Annual Energy Savings	\$800																																																		
Actual use and cost may vary from this estimate depending on occupants use and weather conditions and utility rates in effect at the time.																																																											
Least Efficient										Most Efficient																																																	
= <200 & >150										= <150 & >100										= <100 & >85										= <85 & >70										= <70 & >50										= <50 & >=0									
★★★										★★★★										★★★★★										★★★★★										★★★★★										★★★★★									

Suggested Improvement Recommendations					
Existing	Recommended <input type="checkbox"/>	Estimated <input type="checkbox"/>	Annual	Measure	
	/ Installed <input type="checkbox"/>	/ Actual Cost <input type="checkbox"/>	Savings	Lifetime	
Ceiling Insulation					
Wall Insulation					
Floor Insulation					
Windows					
Air Leakage					
Water Heater					
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
Total Package					

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.

FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

Information for Lenders and Appraisers	
Installed Cost of Improvements	
Weighted Life of Measures	
Present Value Discount Rate	
Present Value Factor (PVF)	
Expected Monthly Mortgage Costs	
Expected Monthly Energy Savings	
Expected Annual Energy Savings	
Expected Annual Maintenance	
Net Annual Savings (NAS)	
Energy Efficiency Premium	

Home Owner Signature \* : \_\_\_\_\_

Energy Rater Signature: \_\_\_\_\_

Date of Rating: \_\_\_\_\_

\* Home Owner Signature required only on Finals

form1119.doc / ERHLForm1119 12/06



## Determining Equipment Efficiencies

Using REMRate's Defaults

Click on HELP

REM/Rate v 12.0 - Untitled.blg

File Go To Libraries Reports Graph Export Options Help

Building Name:

Property Information:

Owner's Name:

Property Address:

City:

State:  Zip:

Phone Number:

Builder Information:

Builder's Name:

Builder's Address:

Model Name/No.:

Development Name:

Phone Number:

Notes

Automatically Open Close

Spreadsheet

A1  Text Clear Sheet

	A	B	C	D	E
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					

Automatically Open Close Help

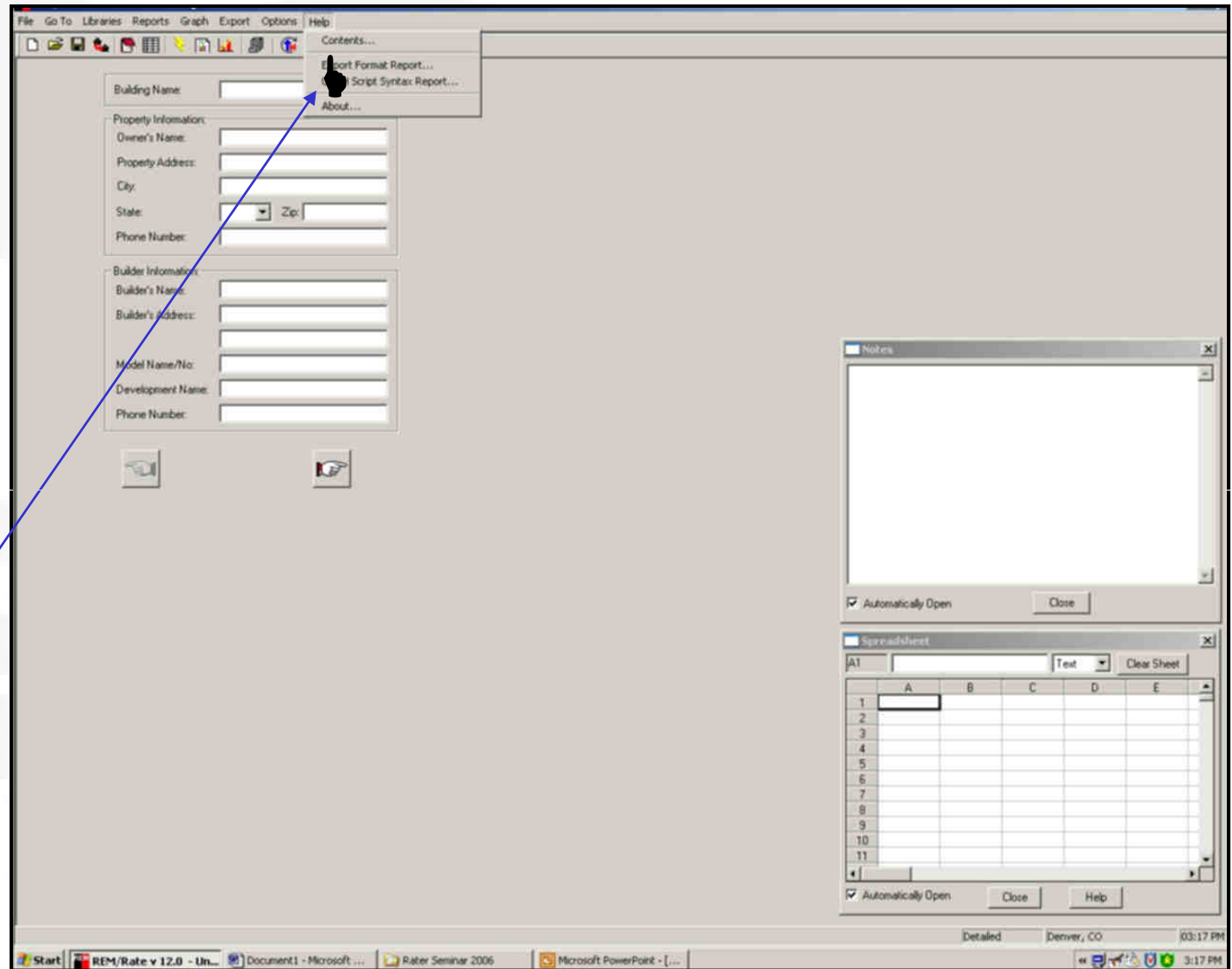
Detailed Denver, CO 12/16/05



## Determining Equipment Efficiencies

Using REMRate's Defaults

Click on CONTENTS

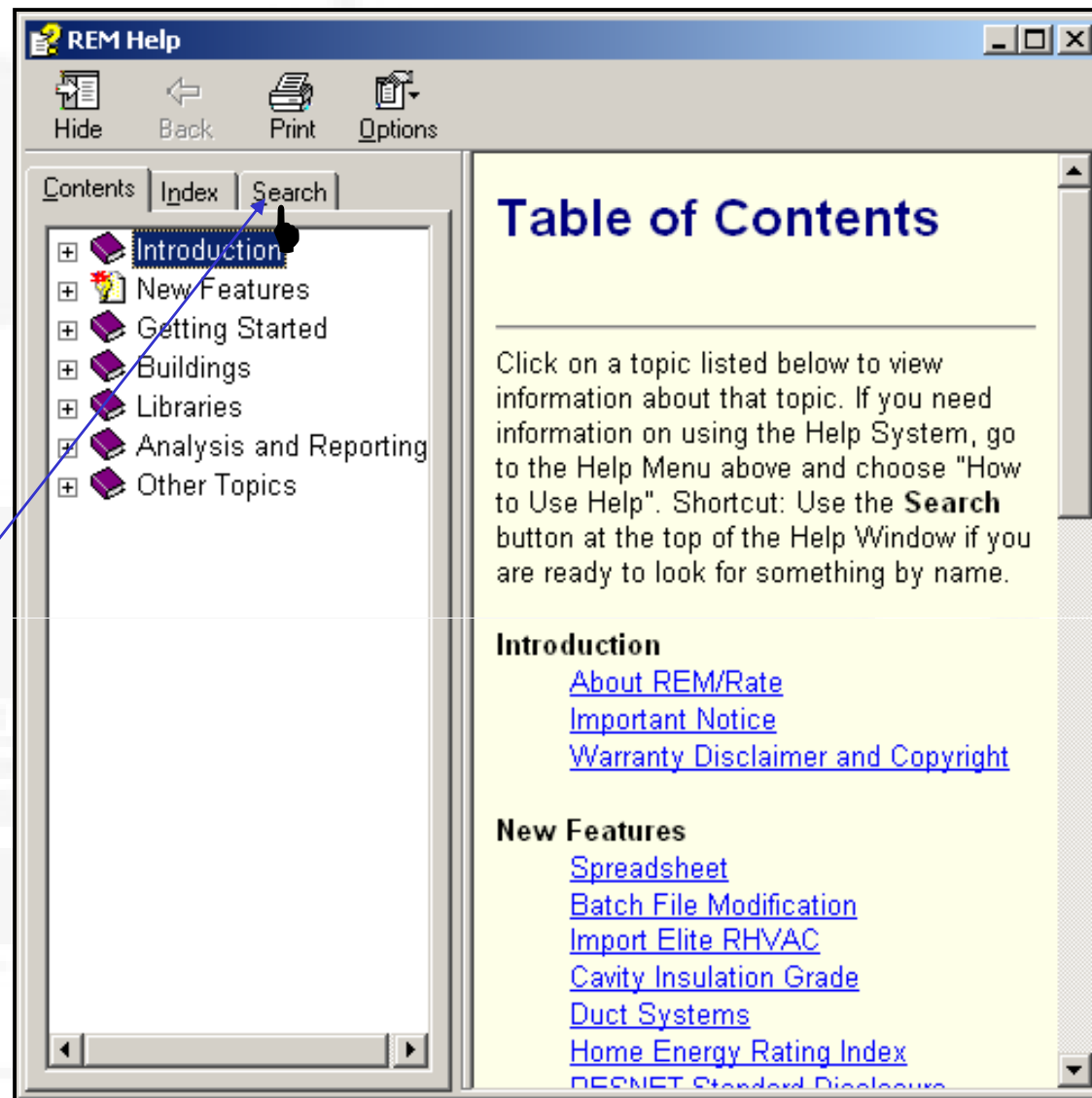




## Determining Equipment Efficiencies

Using REMRate's Defaults

Click on SEARCH





## Determining Equipment Efficiencies

Using REMRate's Defaults

Type in efficiencies HERE

Click on SEARCH

**REM Help**

Hide Back Print Options

Contents Index **Search**

Type in the keyword to find:

efficiencies

List Topics

Select Topic to display:

- About REM/Rate
- ASHRAE Standard 90.2 C...
- Batch File Modification
- Default Equipment Efficiency
- Defining ASHP Equipment
- Defining Cooling Equipment
- Defining DFHP Equipment
- Defining GSHP Equipment
- Defining Heating Equipment
- Defining Integrated Equipment
- Defining Water Heater Type
- Detailed Inputs: Ducts
- Detailed Inputs: Infiltration/...

Display

### Table of Contents

Click on a topic listed below to view information about that topic. If you need information on using the Help System, go to the Help Menu above and choose "How to Use Help". Shortcut: Use the **Search** button at the top of the Help Window if you are ready to look for something by name.

#### Introduction

- [About REM/Rate](#)
- [Important Notice](#)
- [Warranty Disclaimer and Copyright](#)

#### New Features

- [Spreadsheet](#)
- [Batch File Modification](#)
- [Import Elite RHVAC](#)
- [Cavity Insulation Grade](#)
- [Duct Systems](#)
- [Home Energy Rating Index](#)
- [RESNET Standard Disclosure](#)

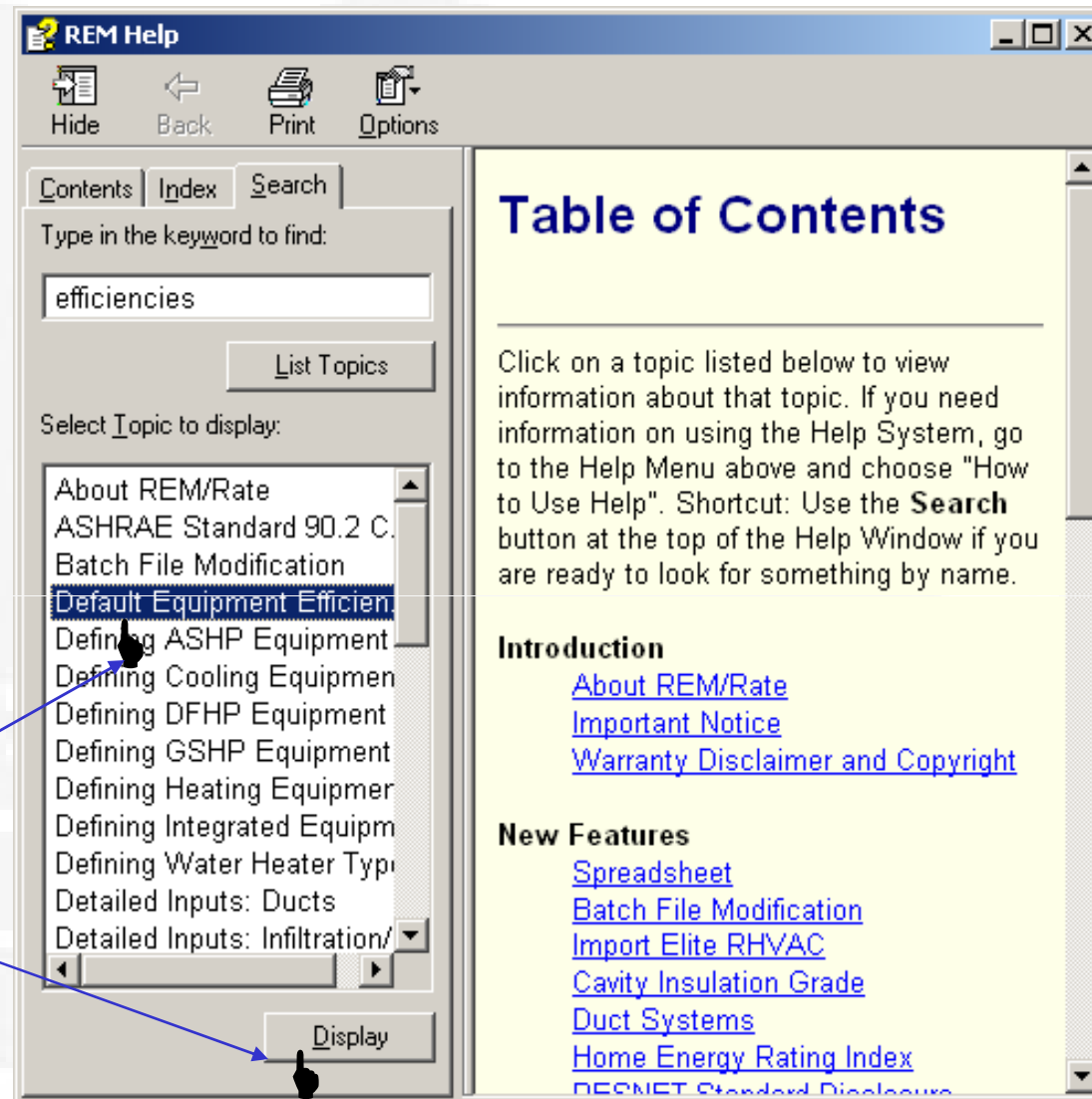


## Determining Equipment Efficiencies

Using REMRate's Defaults

Click on **DEFAULT EQUIPMENT EFFICIENCIES**

Click on **Display**





## HERO Operations Manual

### Determining Equipment Efficiencies

Using REMRate's Defaults:

Click on FILE -  
PRINT  
To print report

REM Help

Hide Back Print Options

Contents Index Search

Type in the keyword to find:

efficiencies

List Topics

Select Topic to display:

- About REMRate
- ASHRAE Standard 90.2 C...
- Batch File Modification
- Default Equipment Efficiency...
- Defining ASHP Equipment...
- Defining Cooling Equipment...
- Defining DFHP Equipment...
- Defining GSHP Equipment...
- Defining Heating Equipment...
- Defining Integrated Equipm...
- Defining Water Heater Types
- Detailed Inputs: Ducts
- Detailed Inputs: Infiltration/...
- Detailed Inputs: Lights and...
- Detailed Inputs: Mechanic...
- Detailed Inputs: Photovolta...
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- Economic Factors
- Energy Analysis
- Fannie Mae New Home EEM
- Home Energy Rating Index
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- Improvement Analysis Rate
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- Library Measures
- Main Menu-Libraries
- Main Menu-Reports Rate
- Massive Walls
- Model Energy Code Compl...
- Performance Adjustment ...
- Performing Analyses Rate
- Rate FAQ
- Sources Of Information
- Warranty And Copyright

Display

### Default Equipment Efficiencies

Suggested default efficiencies for heating, cooling, and water heating equipment are listed below. If values are unavailable from equipment nameplates, it is suggested that values from the Gas Appliance Manufacturers Association (GAMA) Consumers Directory of Certified Efficiency Ratings for Residential Heating and Water Heating Equipment or the Air-Conditioning and Refrigeration Institute (ARI) directories be used.

Year of Manufacture		Pre-60	60-69	70-74	75-83	84-87	88-91	92-
<b>Heating Equipment</b>								
Gas Furnace	AFUE	60	60	65	68	68	76	78
Gas Boiler	AFUE	60	60	65	65	70	77	80
Oil Furnace	AFUE	60	65	72	75	80	80	80
Oil Boiler	AFUE	60	65	72	75	80	80	80
Air-Source Heat Pump	HSPF	4.5	4.5	4.7	5.5	6.3	6.8	6.8
Ground-Water Heat Pump	COP	2.7	2.7	2.7	3.0	3.1	3.2	3.5
Ground-Coupled Heat Pump	COP	2.3	2.3	2.3	2.5	2.6	2.7	3.0

Year of Manufacture		Pre-60	60-69	70-74	75-83	84-87	88-91	92-
<b>Cooling Equipment</b>								
Air-Source Heat Pump	SEER	5.0	6.1	6.5	7.4	8.7	9.4	10.0
Ground-Water Heat Pump	EER	10.0	10.0	10.0	13.0	13.0	14.0	16.0
Ground-Coupled Heat Pump	EER	8.0	8.0	8.0	11.0	11.0	12.0	14.0
Central Air Conditioner	SEER	5.0	6.1	6.5	7.4	8.7	9.4	10.0
Room Air Conditioner	EER	5.0	6.1	6.1	6.7	7.7	8.1	8.5

Year of Manufacture		Pre-60	60-69	70-74	75-83	84-87	88-91	92-
<b>Water Heating Equipment</b>								
Gas Storage	EF	0.47	0.47	0.47	0.49	0.55	0.56	0.56
Oil Storage	EF	0.47	0.47	0.47	0.48	0.49	0.54	0.56
Electric Storage	EF	0.79	0.80	0.80	0.81	0.83	0.87	0.88





## HERO Form 1119


Rating Info.  
on Existing Homes

for the Preliminary

On Preliminaries

Recommended Improvements

Inspect to  
verify Existing  
Home EquipmentEstimated Improvement  
CostAll existing home ratings now  
conducted in REM/Rate Ver. 12+

Energy Rated Homes of Louisiana		Rating Status			
 <b>Energy Rated Homes of Louisiana</b> La. Dept. of Natural Resources		certifies that the home of <u>Mary Case</u> located at: <u>123 Home Street</u> <u>Any Place,</u> <u>LA</u> <u>77777</u> Address City State Zip has been rated using the Uniform Energy Rating System.			
Current Rating	159.6	Estimated Annual Pre-Improvement Energy Costs	\$2,300	Rating After Improvement	129
		Estimated Annual Post-Improvement Energy Costs	\$1,500	Estimated Annual Energy Savings	\$800
Actual use and cost may vary from this estimate depending on occupants use and weather conditions and utility rates in effect at the time.					
Least Efficient      = <200 & >150      = <150 & >100      = <100 & >85      = <85 & >70      = <70 & >50      = <50 & >=0      Most Efficient ★★ ★           ★★ ★+           ★★ ★★           ★★ ★★+           ★★ ★★           ★★ ★★+					
<b>Suggested Improvement Recommendations</b>					
	Existing	Recommended <input checked="" type="checkbox"/> / Installed <input type="checkbox"/>	Estimated <input checked="" type="checkbox"/> / Actual Cost <input type="checkbox"/>	Annual Savings	Measure Lifetime
Ceiling Insulation	R5	R30	\$1,200		30
Wall Insulation					
Floor Insulation					
Windows	9nch	2nch	\$300		30
Air Leakage					
Water Heater	80ef	88ef	\$500		15
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
<b>Total Package</b>			<b>\$2,000</b>		
Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.					
Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.					
FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.					
<b>Information for Lenders and Appraisers</b>					
Installed Cost of Improvements					\$2,000
Weighted Life of Measures					
Present Value Discount Rate					
Present Value Factor (PVF)					
Expected Monthly Mortgage Costs					
Expected Monthly Energy Savings					
Expected Annual Energy Savings					
Expected Annual Maintenance					
Net Annual Savings (NAS)					
<b>Energy Efficiency Premium</b>					
Home Owner Signature *:					
Energy Rater Signature:					
Date of Rating:					
* Home Owner Signature required only on Finals					





## HERO Form 1119

Rating Info.  
on Existing Homes

for the Preliminary

Calculating Weighted Life  
of ImprovementsAll existing home ratings now  
conducted in REM/Rate Ver. 12+

La. Dept. of Natural Resources

## Energy Rated Homes of Louisiana

certifies that the home of Mary Case located at:123 Home Street Any Place, LA 77777Address City State Zip  
has been rated using the Uniform Energy Rating System.

## Rating Status

Preliminary ☒Final ☐New ☐Existing ☒(New Preliminary  
is from PLANS)Current  
Rating

159.6

Estimated  
Annual Pre-  
Improvement  
Energy Costs

\$2,300

Rating After  
Improvement

129

Estimated  
Annual Post  
Improvement  
Energy Costs

\$1,500

Estimated  
Annual Energy  
Savings

\$800

Actual use and cost may vary from this estimate depending on occupants use and weather conditions and utility rates in effect at the time.

Least  
Efficient=<200 & >150  
★★★=<150 & >100  
★★★★=<100 & >85  
★★★★★=<85 & >70  
★★★★★=<70 & >50  
★★★★★=<50 & >=0  
★★★★★Most  
Efficient

## Suggested Improvement Recommendations

	Existing	Recommended / Installed <input checked="" type="checkbox"/>	Estimated / Actual Cost <input checked="" type="checkbox"/>	Annual Savings	Measure Lifetime
Ceiling Insulation	R5	R30	\$1,200		30
Wall Insulation					
Floor Insulation					
Windows					
Air Leakage	9nch	2nch	\$300		30
Water Heater	80ef	88ef	\$500		15
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
<b>Total Package</b>			<b>\$2,000</b>		

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.

FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

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## Information for Lenders and Appraisers

Installed Cost of Improvements	\$2,000
Weighted Life of Measures	
Present Value Discount Rate	
Present Value Factor (PVF)	
Expected Monthly Mortgage Costs	
Expected Monthly Energy Savings	
Expected Annual Energy Savings	
Expected Annual Maintenance	
Net Annual Savings (NAS)	
<b>Energy Efficiency Premium</b>	

Home Owner Signature \*:

Energy Rater Signature:

Date of Rating:

\* Home Owner Signature required only on Finals



## *Calculating Blended Weighted Life for Upgraded Equipment*

*When a single component is installed on an existing home (use these values)*

• WINDOWS & DOORS	= 20 years
• INSULATION	= 30 years
• DUCT LEAKAGE	= 30 years
• WHOLE HOUSE INFILTRATION	= 30 years
• HEAT PUMP	= 17 years
• CONVENTIONAL AC	= 15 years
• FURNACE (GAS or ELECTRIC)	= 15 years
• COMBINED AC & FURNACE UNIT	= 15 years
• HOT WATER HEATER (GAS or ELECTRIC)	= 15 years

*Note : On a new home a 20 year useful life must now be used in lieu of performing the Blended Weighted Life Calculation*



## *Calculating Blended Weighted Life for Upgraded Equipment on an existing home*

*When more than one component is installed on an existing home, or if using the differential cost on equipment for a new home, use the Weighted Useful Life Formula:*

$$\frac{(\text{Useful Life } a \times \$a) + (\text{Useful Life } b \times \$b) + (\text{Useful Life } c \times \$c)}{\$a + \$b + \$c}$$

**EXAMPLE :** a) INSULATION, b) INFILTRATION c) HOT WATER HEATER (on an existing home)

$$\frac{(30 \times \$1200) + (30 \times \$300) + (15 \times \$500)}{\$1200 + \$300 + \$500} =$$

$$\frac{\cancel{\$36000} + \cancel{\$9000} + \cancel{\$7500}}{\cancel{\$1200} + \cancel{\$300} + \cancel{\$500}} = \frac{52500}{2000} = 26.25 \text{ years} = \underline{26 \text{ years}}$$



## HERO Form 1119

Rating Info.  
on Existing Homes

for the Preliminary

Calculating Weighted Life  
of ImprovementsDiscount Rate  
MIN 5%

PVF=EPP/EAES

Monthly Mortgage Cost

Monthly Energy  
Savings =EAES/12

Annual Energy Savings

Annual Maintenance

NAS = EAES

EEP Calculated  
from Economic SummaryRater MUST sign and  
date the preliminaryAll existing home ratings now  
conducted in REM/Rate Ver. 12+

**Energy Rated Homes of Louisiana**  
certifies that the home of Mary Case located at:  
123 Home Street Any Place, LA 77777  
Address City State Zip  
has been rated using the Uniform Energy Rating System.

**Rating Status**  
Preliminary ☒  
Final ☐  
New ☐  
Existing ☒  
(New Preliminary is from PLANS)

Current Rating: **159.6** Estimated Annual Pre-Improvement Energy Costs: **\$2,300** Rating After Improvement: **129** Estimated Annual Post-Improvement Energy Costs: **\$1,500** Estimated Annual Energy Savings: **\$800**

Actual use and cost may vary from this estimate depending on occupants use and weather conditions and utility rates in effect at the time.

Least Efficient	= <200 & >150 ★★★	= <150 & >100 ★★★★	= <100 & >85 ★★★★★	= <85 & >70 ★★★★★	= <70 & >50 ★★★★★	= <50 & >=0 ★★★★★	Most Efficient
-----------------	----------------------	-----------------------	-----------------------	----------------------	----------------------	----------------------	----------------

Suggested Improvement Recommendations					
	Existing	Recommended <input checked="" type="checkbox"/> / Installed <input type="checkbox"/>	Estimated <input checked="" type="checkbox"/> / Actual Cost <input type="checkbox"/>	Annual Savings	Measure Lifetime
Ceiling Insulation	R5	R30	\$1,200		30
Wall Insulation					
Floor Insulation					
Windows					
Air Leakage	9nch	2nch	\$300		30
Water Heater	80ef	88ef	\$500		15
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
<b>Total Package</b>			<b>\$2,000</b>		

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.

FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

Information for Lenders and Appraisers	
Installed Cost of Improvements	\$2,000
Weighted Life of Measures	26
Present Value Discount Rate	5%
Present Value Factor (PVF)	10%
Expected Monthly Mortgage Costs	N/A
Expected Monthly Energy Savings	\$67
Expected Annual Energy Savings	\$800
Expected Annual Maintenance	N/A
Net Annual Savings (NAS)	\$800
Energy Efficiency Premium	\$8,000

Home Owner Signature \*: \_\_\_\_\_  
Energy Rater Signature: John D. Rater  
Date of Rating: 6/25/05  
\* Home Owner Signature required only on Final

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# HERO Form 1119

## Rating Info. on Existing Homes

for the Final  
Submit to DNR within 2 weeks

These figures are recalculated  
using the new actual Final Rating  
Score while the Preliminary  
Score remains the same

On Finals


You must INSPECT to see what  
measures have actually been  
INSTALLED

If the actual installed cost are  
different from your estimated  
installed cost - you must  
recalculate these figures

As well as these

Rater and Home Owner  
**MUST** sign and date  
the final

All existing home ratings now  
conducted in REM/Rate Ver. 12+



**Energy Rated Homes  
OF LOUISIANA**  
La. Dept. of Natural Resources

**Energy Rated Homes of Louisiana**  
certifies that the home of Mary Case located at:  
123 Home Street Any Place, LA 77777  
Address City State Zip  
has been rated using the Uniform Energy Rating System.

**Rating Status**  
Preliminary ☐  
Final ☒  
  
New ☐  
Existing ☒  
(New Preliminary  
is from PLANS)

Current Rating: **159.6**

Estimated Annual Pre-Improvement Energy Costs: **\$2,300**

Rating After Improvement: **126**

Estimated Annual Post Improvement Energy Costs: **\$1,300**

Estimated Annual Energy Savings: **\$1,000**

Actual use and cost may vary from this estimate depending on occupants use and weather conditions and utility rates in effect at the time.

Least Efficient	<=280 & >150	<=150 & >100	<=100 & >85	<=85 & >70	<=70 & >50	<=50 & >=0	Most Efficient
	★★★	★★★★	★★★★★	★★★★★	★★★★★	★★★★★	

**Suggested Improvement Recommendations**

	Existing	Recommended <input type="checkbox"/>	Estimated <input type="checkbox"/>	Annual Savings	Measure Lifetime
Ceiling Insulation	R5	R30	\$1,300		30
Wall Insulation					
Floor Insulation					
Windows	9nach	2nach	\$500		30
Air Leakage	80ef	88ef	\$400		15
Water Heater					
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
<b>Total Package</b>			<b>\$2,200</b>		

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

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FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

**Information for Lenders and Appraisers**

Installed Cost of Improvements	<b>\$2,200</b>
Weighted Life of Measures	<b>26</b>
Present Value Discount Rate	<b>5%</b>
Present Value Factor (PVF)	<b>8.4%</b>
Expected Monthly Mortgage Costs	<b>N/A</b>
Expected Monthly Energy Savings	<b>\$83</b>
Expected Annual Energy Savings	<b>\$1,000</b>
Expected Annual Maintenance	<b>N/A</b>
Net Annual Savings (NAS)	<b>\$1,000</b>
<b>Energy Efficiency Premium</b>	<b>\$8,400</b>

Home Owner Signature \*: Mary Case  
 Energy Rater Signature: John D. Rater  
 Date of Rating: 12/10/05  
\* Home Owner Signature required only on Finals





If the rating is a preliminary on a new home it means that it was rated from plans

# HERO Form 1119

## Rating Info. on New Homes

for the Preliminary  
Submit to DNR within 2 weeks  
Home Owners Name

Rated Address

New Homes at the planning  
stage are ALWAYS  
Compared to an EXACT  
80.0 house

From Quick Analysis  
for 80.0 house

Raters Propose Rating  
from plans with the  
RECOMMENDATION

From Quick Analysis  
for proposed house

Pre-Improvement Energy Cost  
-Post Improvement Energy Cost  
Estimated Annual Energy Savings

**Energy Rated Homes of Louisiana**  
certifies that Mary Case of LA located at:  
123 Home Street Any Place, LA 77777  
Address City State  
has been rated using the HERO Form Energy Rating

Current Rating: **80** Improvement: **1,600** Rating: **87.0** Estimated Annual Energy Cost: **100** Estimated Annual Energy Savings: **\$500**

Least Efficient: **★★★** Most Efficient: **★★★★★**

Suggested Improvement Recommendations					
	Existing	Recommended <input type="checkbox"/> Installed <input type="checkbox"/>	Estimated <input type="checkbox"/> Actual <input type="checkbox"/>	Annual Savings	Measure Lifetime
Ceiling					
Wall Insulation					
Floor Insulation					
Windows					
Air Leakage					
Water Heater					
Duct Leakage					
Heating Equipment					
Cooling Equipment					
Other					
<b>Total Package</b>					

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

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FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

**Information for Lenders and Appraisers**

Installed Cost of Improvements	
Weighted Life of Measures	
Present Value Discount Rate	
Present Value Factor (PVF)	
Expected Monthly Mortgage Costs	
Expected Monthly Energy Savings	
Expected Annual Energy Savings	
Expected Annual Maintenance	
Net Annual Savings (NAS)	
<b>Energy Efficiency Premium</b>	

Home Owner Signature \*: \_\_\_\_\_  
Energy Rater Signature: \_\_\_\_\_  
Date of Rating: \_\_\_\_\_  
\* Home Owner Signature required only on Finals

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## HERO Form 1119

### Rating Info. on New Homes

for the Preliminary

On Preliminaries

From modeled 80.0 house

From Proposed Improved Plan

DIFFERENCE in cost between  
80.0 house and proposed  
improved house

**Energy Rated Homes of Louisiana**  
certifies that the home of **Mary Case** located at:  
**123 Home Street**, **Place**, **LA** **7777**  
Address City State  
has been rated using the **HERO** Energy Rating System.

Current Rating: **80** Annual Energy Cost: **\$600** Rating Improvement: **87.0** Estimated Annual Energy Cost Improvement: **\$100** Estimated Annual Energy Savings: **\$500**

Least Efficient: **= < 200 & > 150** **★★★** **= > 100** **★★★★** **= < 100 & > 85** **★★★★★** **= < 70 & > 50** **★★★★★** **= < 50 & > 0** **★★★★★** Most Efficient

Suggested Improvement Recommendations					
	Existing	Recommended / Required	Estimated Cost / Actual	Annual Savings	Measure Lifetime
Ceiling	R19	R38	\$1,000		30
Wall Insulation	R11	R19	1,000		30
Floor Insulation	N/A	N/A	N/A		-
Windows	31	U.46	2,000		20
Air Leakage	70cfm	35cfm	500		30
Water Heater	70%	90%	100		15
Duct Leakage	1000cfm	150cfm	800		30
Heating Equipment	1ef	6.8hspf	2000		17
Cooling Equipment	seer10	12seer	-		-
Other					
<b>Total Package</b>			<b>\$7,600</b>		

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

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**Information for Lenders and Appraisers**

Installed Cost of Improvements	
Weighted Life of Measures	
Present Value Discount Rate	
Present Value Factor (PVF)	
Expected Monthly Mortgage Costs	
Expected Monthly Energy Savings	
Expected Annual Energy Savings	
Expected Annual Maintenance	
Net Annual Savings (NAS)	
<b>Energy Efficiency Premium</b>	

Home Owner Signature \* :  
Energy Rater Signature:  
Date of Rating:  
\* Home Owner Signature required only on Finals





# HERO Form 1119

## Rating Info. on New Homes for the Preliminary

DIFFERENCE in cost between  
80.0 house and proposed  
improved house  
(differential costs not mandatory  
but acceptable-If not using  
differential costs use \$10,000)

On New Homes always  
use a 20 year  
Weighted Useful Life

**Energy Rated Homes of Louisiana**  
certifies that Mary Cas of LA located at:  
123 Home Street Place, LA 77777  
Address City State  
has been rated using the Form Energy Rating

Current Rating: **80** Estimated Annual Energy Cost: **\$1,600** Estimated Annual Energy Savings: **\$500**  
Least Efficient: **★★★** Most Efficient: **★★★★★**

**Suggested Improvement Recommendations**

	Existing	Recommended / Installed	Estimated / Actual	Annual Savings	Measure Lifetime
Ceiling	R19	R38	\$1,000		30
Wall Ins.	R11	R19	1,000		30
Floor Ins.	N/A	N/A	N/A		-
Windows	U. 31	U. 46	2,000		20
Air Leakage	75cfm	35cfm	500		30
Water Heater	75%	98%	100		15
Duct Leakage	1000cfm	150cfm	800		30
Heating Equipment	1ef	6.8hspf	2000		17
Cooling Equipment	seer10	12seer	-		-
Other					
<b>Total Package</b>			<b>\$7,600</b>		

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.

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**Information for Lenders and Appraisers**

Installed Cost of Improvements	<b>\$7,600</b>
Weighted Life of Measures	<b>20</b>
Present Value Discount Rate	
Present Value Factor (PVF)	
Expected Monthly Mortgage Costs	
Expected Monthly Energy Savings	
Expected Annual Energy Savings	
Expected Annual Maintenance	
Net Annual Savings (NAS)	
<b>Energy Efficiency Premium</b>	

Home Owner Signature \*: \_\_\_\_\_  
Energy Rater Signature: \_\_\_\_\_  
Date of Rating: \_\_\_\_\_  
\* Home Owner Signature required only on Finals

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Remember : You now **MUST** always use 20 years  
for weighted life on a new home

## HERO Form 1119

### Rating Info. on New Homes

for the Preliminary

**DIFFERENCE** in cost between  
80.0 house and proposed  
improved house  
(differential costs not mandatory  
but acceptable-If not using  
differential costs use \$10,000)

On New Homes always use  
A Weighted Useful Life  
of 20 years

These figures come from  
the same source as discussed  
earlier

Rater **MUST** sign and  
date the preliminary

**Energy Rated Homes of Louisiana**  
certifies that the home of Mary Cas... located at:  
123 Home Street, Place, LA 77777  
Address City State  
has been rated using the Form Energy Rating

Current Rating: **80** Estimated Annual Energy Cost: **\$1,600** Estimated Annual Energy Savings: **\$500**

Least Efficient: **★★★** Most Efficient: **★★★★★**

Suggested Improvement Recommendations					
	Existing	Recommended / Installed	Estimated Annual Savings	Estimated Lifetime Savings	Measure
Ceiling	R19	R38	\$1,000	30	
Wall Ins.	R11	R19	1,000	30	
Floor Ins.	N/A	N/A	N/A	-	
Windows	U. 31	U. 46	2,000	20	
Air Leakage	35	35	500	30	
Water Heater	70	80	100	15	
Duct Leakage	1000cfm	150cfm	800	30	
Heating Equipment	1ef	6.8hspf	2000	17	
Cooling Equipment	seer10	12seer	-	-	
Other					
<b>Total Package</b>			<b>\$7,600</b>		

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

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FHA Certification: I certify, that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

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**Information for Lenders and Appraisers**

Installed Cost of Improvements	<b>\$7,600</b>
Weighted Life of Measures	<b>20</b>
Present Value Discount Rate	<b>5%</b>
Present Value Factor (PVF)	<b>50%</b>
Expected Monthly Mortgage Costs	<b>N/A</b>
Expected Monthly Energy Savings	<b>\$42</b>
Expected Annual Energy Savings	<b>\$500</b>
Expected Annual Maintenance	<b>N/A</b>
Net Annual Savings (NAS)	<b>\$500</b>
<b>Energy Efficiency Premium</b>	<b>\$22,000</b>

Home Owner Signature \*: \_\_\_\_\_  
Energy Rater Signature: **John D. Rater**  
Date of Rating: **4/25/05**  
\* Home Owner Signature required only on Finals



# HERO Operations Manual

Submit to DNR within 2 weeks

## HERO Form 1119

### Rating Info. on New Homes

for the Final  
difference in cost  
between Existing  
and Installed cost  
or use \$10,000 for  
total

New Homes are ALWAYS  
Compared to an EXACT 80.0  
House. This info should be the  
same as it was on the Preliminary

This is the rating of the  
house as it was before  
this score is different  
the Preliminary it will effect  
the Post Improvement Energy  
Cost as well as Annual Energy  
Savings

If different RAI - it will also  
effect the calculations HERE

Your Final Rating includes an INSPECTION  
that VERIFIES what improvements  
were incorporated as well as a  
INSPECTION for all of the MANDATORY Requirements

**Energy Rated Homes of Louisiana**  
certifies that the home of Mary Case located at:  
123 Home Street, Place, LA 77777  
Address City State  
has been rated using the Form Energy Rating

Current Rating: **80** Estimated Annual Energy Cost: **\$1,600** Estimated Annual Energy Savings: **\$600**

Least Efficient: **★★★** Most Efficient: **★★★★★**

Suggested Improvement Recommendations				
Existing	Recommended	Estimated Cost	Annual Savings	Measure Lifetime
Ceiling	R19	R38	\$1,000	30
Wall Ins.	R11	R19	800	30
Floor Ins.	N/A	N/A	N/A	-
Windows	U-31	U-46	2,500	20
Air Leakage	7cfh	3cfh	700	30
Water Heater	70%	90%	100	15
Duct Leakage	1000cfm	150cfm	800	30
Heating Equipment	1ef	6.8hspf	2,000	17
Cooling Equipment	seer10	12seer	-	-
Other				
<b>Total Package</b>			<b>\$6,900</b>	

Note: The savings for each individual measure will change when combined with others. Thus, the sum of all individual savings may not equal the sum of the combined package.

Disclaimer: Every effort has been made to provide accurate information on this form based on the best professional judgement as to the house energy features found on the date of the inspection. Neither this form nor any entries made on it constitute any warranty, express or implied, as to the condition or performance of energy features, the actual energy consumption, or the cost of energy for this house after that date.

FHA Certification: I certify that to the best of my knowledge and belief, the information contained in this report is true and accurate and I understand that the information in this report may be used in connection with an application for an energy efficient mortgage to be insured by the Federal Housing Administration of the United States Department of Housing and Urban Development.

Information for Lenders and Appraisers

Installed Cost of Improvements	\$6,900
Weighted Life of Measures	20
Present Value Discount Rate	5%
Present Value Factor (PVF)	42%
Expected Monthly Mortgage Costs	N/A
Expected Monthly Energy Savings	\$50
Expected Annual Energy Savings	\$600
Expected Annual Maintenance	N/A
Net Annual Savings (NAS)	\$600
Energy Efficiency Premium	\$25,000

Home Owner Signature: Mary Case  
Energy Rater Signature: John D. Rater  
Date of Rating: 12/18/05  
\* Home Owner Signature required only on Finals

Rater and Home Owner  
MUST sign and date  
the final



## HERO Operations Manual

ratehero@dnr.state.la.us

ALL Ratings sent by  
E-mail to :

### Rater Information on ALL submittals

Raters Name  
and ph. #

Raters SSN or EIN

Homeowner Name

Homeowner SSN

Homeowner Phone #

HERO Cover Sheet		To : <u>ratehero@dnr.state.la.us</u>	Rater Name : <u>John Q. Rater</u>	Rater SSN/EIN# : <u>123-45-6789</u>	Rater Ph. # : <u>225-129-7895</u>
If this Rating is a PRELIMINARY =		<input type="checkbox"/> New Home	<input type="checkbox"/> Existing Home	Preliminary Score	Preliminary Date
Provide Scan of a Signed Tax Letter with ALL PRELIMINARIES		<input type="checkbox"/>			
If this Rating is a FINAL =		<input type="checkbox"/> New Home	<input type="checkbox"/> Existing Home	Preliminary Score	Preliminary Date
Provide Scan of a Dated Slab Pour Receipt with ALL New Home FINALS		<input type="checkbox"/>			
Home Owner : <u>John Doe</u>		Home Owner SSN/EIN# : <u>12-345678</u>		Home Owner Ph. # : <u>225-123-4567</u>	
Rated Address : (Rating Property Address)		Mailing Address : (For Check from W9)			
(Street)		(Zip)		(Street)	
(City)		(Parish)		(City)	
Utility Provider : <u>Acct. # or Meter # :</u>		Rating Software : (Software Name) (Version)			
Software Building Files :		Base : (bfg. file name) Prelim. : (bfg. file name) Final. : (bfg. file name) Other : (bfg. file name)			
Scanned Documents (for New and Existing Homes):		Scanned Documents (additionally for Existing Homes):			
Form 1119 : Form W9 : Econ. Sum. : EC&F. :		Receipts : Cert. of Comp. :			
NEW Min. Score of 86 on Final		EXISTING Min. 30 pt. increase on Final		NEW SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met)	
Ener. Eff. Prem. = \$		Ener. Eff. Prem. = \$		EXISTING If replacing AC - SEER 13 min. and Inspect for	
20% of EEP <u>X</u> .2		Cost of Improvements = \$		Voluntary Items (1-12 / each item carries a weighted Upgrade Point value - see p.2 of Cover Sheet)	
Unadjusted Rebate = \$		Lesser of the above = \$		Mandatory Requirements	
Adjustment = <u>X</u>		20% of EEP or COI <u>X</u> .2		Met=1 Not Met=0	
Adjusted HERO Rebate = \$		Unadjusted Rebate = \$		#1) Duct Reqmt. =	
Adjustment = <u>X</u>		Adjustment = <u>X</u>		#2) Chase Reqmt. =	
Adjusted HERO Rebate = \$		Adjusted HERO Rebate = \$		#3) Knee Wall Reqmt. =	
				#4) Fire Place Opening Req. =	
				#5) Recessed Light Reqmt. =	
				#6) Attic Access Reqmt. =	
				#7) Added Attic Insul. =	
				#8) Added Wall Insul. =	
				#9) Gas Heat Eff. Incr. or HP=	
				#10) HWH Eff. Incr. =	
				#11) Window Upgrade =	
				#12) Upgrade Package =	
				TOTAL	
				TOTAL ADJMT.	

July 1 - Sept. 30, 2006





## HERO Operations Manual

**NEW Scanned copy of the Signed and Dated Tax Letter now required with all Preliminaries**

### Rating Information on Existing Homes

for the Preliminary

This score is the home as is -  
before any improvements have  
been made

HERO Cover Sheet		To : <a href="mailto:ratehero@dnr.state.la.us">ratehero@dnr.state.la.us</a>		Rater Name : <b>John Q. Rater</b>		Rater SSN/VIN# : <b>123-45-6789</b>		Rater Ph. # : <b>225-129-7895</b>	
If this Rating is a PRELIMINARY =		<input checked="" type="checkbox"/> New Home		<input checked="" type="checkbox"/> Existing Home		<b>152.6</b>		Preliminary Score	
Provide Scan of a Signed Tax Letter with ALL PRELIMINARIES		<input checked="" type="checkbox"/>						Preliminary Date	
If this Rating is a FINAL =		<input type="checkbox"/> New Home		<input type="checkbox"/> Existing Home				Preliminary Score	
Provide Scan of a Dated Slab Pour Receipt with AEL New Home FINALS		<input type="checkbox"/>						Preliminary Date	
Home Owner :		<b>John Doe</b>		Home Owner SSN/EIN# :		<b>12-345678</b>		Home Owner Ph. # : <b>225-123-4567</b>	
Rated Address :				Mailing Address :					
(Rating Property Address)				(For Check from W9)					
(Street)		(Zip)		(Street)		(Zip)			
(City)		(Parish)		(City)		(Parish)			
Utility Provider :		Acct. # or Meter # :		Rating Software					
(Utility Company Name)		Indicate One (Acct.# or Mtr. #)		(Software Name)		(Version)			
Software Building Files :									
Base :		Prelim. :		Final :		Other :			
(bldg. file name)		(bldg. file name)		(bldg. file name)		(bldg. file name)			
Scanned Documents (for New and Existing Homes):				Scanned Documents (additionally for Existing Homes):					
Form 1119 :		Form W9 :		Econ. Sum. :		EC&F. :		Recpts. : Cert. of Comp.:	
NEW Min. Score of 86 on Final		EXISTING Min. 30 pt. increase on Final		NEW SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met)		EXISTING If replacing AC - SEER 13 min. and Inspect for		Voluntary Items (1-12 / each item carries a weighted Upgrade Point value - see p.2 of Cover Sheet)	
Ener. Eff. Prem. = \$		Ener. Eff. Prem. = \$		Mandatory Requirements		TOTAL		ADJMT.	
20% of EEP <b>X</b> .2		Cost of Improvements = \$		Met=1 Not Met=0		0 =		X 0.50	
Unadjusted Rebate = \$		Lesser of the above = \$		#1) Duct Reqmt. =		1 =		X 0.58	
Adjustment = <b>X</b>		20% of EEP or COI <b>X</b> .2		#2) Chase Reqmt. =		2 =		X 0.67	
Adjusted HERO Rebate = \$		Unadjusted Rebate = \$		#3) Knee Wall Reqmt. =		3 =		X 0.75	
		Adjustment = <b>X</b>		#4) Fire Place Opening Req. =		4 =		X 0.83	
		Adjusted HERO Rebate = \$		#5) Recessed Light Reqmt. =		5 =		X 0.92	
				#6) Attic Access Reqmt. =		6 =		X 1.00	
				#7) Added Attic Insul. =					
				#8) Added Wall Insul. =					
				#9) Gas Heat Effic. Incr. or HP=					
				#10) HWH Effic. Incr. =					
				#11) Window Upgrade =					
				#12) Upgrade Package =					
				TOTAL					

July 1 - Sept. 30, 2006



## HERO Operations Manual

### Rating Information on Existing Homes

for the Final

This score is the home after  
the improvements have been  
installed and verified

HERO Cover Sheet		To : <u>ratehero@dnr.state.la.us</u>	Rater Name : <u>John Q. Rater</u>	Rater SSN/VIN# : <u>123-45-6789</u>	Rater Ph. # : <u>225-129-7895</u>
If this Rating is a PRELIMINARY =		<input type="checkbox"/> New Home	<input type="checkbox"/> Existing Home	Preliminary Score	Preliminary Date
Provide Scan of a Signed Tax Letter with ALL PRELIMINARIES		<input checked="" type="checkbox"/>			
If this Rating is a FINAL =		<input type="checkbox"/> New Home	<input checked="" type="checkbox"/> Existing Home	Preliminary Score <u>152.6</u>	Preliminary Date <u>6/25/05</u>
Provide Scan of a Dated Slab Pour Receipt with ALL New Home FINALS		<input type="checkbox"/> <u>141</u> Final Score <u>12/10/05</u> Final Date			
Home Owner : <u>John Doe</u>		Home Owner SSN/EIN# : <u>12-345678</u>		Home Owner Ph. # : <u>225-123-4567</u>	
Rated Address : (Rating Property Address)		Mailing Address : (For Check from W9)			
(Street)		(Zip)		(Street) (Zip)	
(City)		(Parish)		(City) (Parish)	
Utility Provider : <u></u>		Acct. # or Meter # : <u></u>		Rating Software	
(Utility Company Name)		Indicate One (Acct.# or Mtr. #)		(Software Name) (Version)	
Software Building Files		Base : (bldg. file name) Prelim. : (bldg. file name) Final : (bldg. file name) Other : (bldg. file name)			
Scanned Documents (for New and Existing Homes):		Scanned Documents (additionally for Existing Homes):			
Form 1119 : <u></u> Form W9 : <u></u> Econ. Sum. : <u></u> EC&F : <u></u>		Recpts : <u></u> Cert. of Comp. : <u></u>			
NEW Min. Score of 86 on Final		EXISTING Min. 30 pt. increase on Final		NEW SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met)	
Ener. Eff. Prem. = \$ <u></u>		Ener. Eff. Prem. = \$ <u></u>		EXISTING If replacing AC - SEER 13 min. and Inspect for	
20% of EEP <u>X</u> .2		Cost of Improvements = \$ <u></u>		Voluntary Items (1-12 / each item carries a weighted Upgrade Point value - see p.2 of Cover Sheet)	
Unadjusted Rebate = \$ <u></u>		Lesser of the above = \$ <u></u>		Mandatory Requirements	
Adjustment = <u>X</u>		20% of EEP or COI <u>X</u> .2		Met=1 Not Met=0	
Adjusted HERO Rebate = \$ <u></u>		Unadjusted Rebate = \$ <u></u>		#1) Duct Reqmt. = <u></u>	
		Adjustment = <u>X</u>		#2) Chase Reqmt. = <u></u>	
		Adjusted HERO Rebate = \$ <u></u>		#3) Knee Wall Reqmt. = <u></u>	
				#4) Fire Place Opening Req. = <u></u>	
				#5) Recessed Light Reqmt. = <u></u>	
				#6) Attic Access Reqmt. = <u></u>	
				#7) Added Attic Insul. = <u></u>	
				#8) Added Wall Insul. = <u></u>	
				#9) Gas Heat Effic. Incr. or HP= <u></u>	
				#10) HWH Effic. Incr. = <u></u>	
				#11) Window Upgrade = <u></u>	
				#12) Upgrade Package = <u></u>	
				TOTAL = <u></u>	

	TOTAL	ADJMT.
0 =	X	0.50
1 =	X	0.58
2 =	X	0.67
3 =	X	0.75
4 =	X	0.83
5 =	X	0.92
6 =	X	1.00

July 1 - Sept. 30, 2006



**NEW Scanned copy of the Signed and Dated Tax Letter now required with all preliminaries**

## Rating Information on New Homes

*for the Preliminary*

*This score is the home rated from plans - incorporating the raters recommendations*

**HERO Cover Sheet** To : ratehero@dnr.state.la.us Rater Name: John Q. Rater SSN/VIN# 123-45-6789 Rater Phone: 504-123-4567

If this Rating is a **PRELIMINARY** = ☒ New Home ☐ Existing Home **86.0** Preliminary Score **4/25/05** Preliminary Date

Provide Scan of a Signed Tax Letter with ALL PRELIMINARY Ratings

If this Rating is a **FINAL** = ☐ New Home ☐ Existing Home ☐ Preliminary ☐ Preliminary

Provide Scan of a Dated Slab Four Receipt with ALL New Home **FINALS** Final Score Final Date

Home Owner : John Doe Home Owner SSN/EIN# 123-45-6789 Home Owner Ph.# : 225-123-4567

Rated Address : (Rating Property Address) Mailing Address (For Check from)

(Street) (Zip) (For Check from Street)

(City) (Parish) (Parish)

Utility Provider Acct. # or Meter # : Rating Software (Utility Company Name) Indicate One (Acct. #) (Software Name) (Version)

Software Build Base : Prelim. : Final : Other : (bldg. file name) (bldg. file name) (bldg. file name) (bldg. file name)

Scanned Documents (New and Existing Homes): Scanned Documents (additionally for Existing Homes):

Form 1119 : W9 : Econ. Sum. : EC & F. : Receipts : Cert. of Comp. :

**NEW** Min. Score of **13** **EXISTING** Min. 30 pt increase on Final **NEW** SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met) **EXISTING** If replacing AC - SEER 13 min. and Inspect for Voluntary Items (1-12 / each item carries a weighted Upgrade Point value - see p.2 of Cover Sheet)

Ener. Eff. Prem. = \$ Cost of Improvements = \$

20% of EEP ☒ .2 Lesser of the above = \$

Unadjusted Rebate = \$ 20% of EEP or COI ☒ .2

Adjustment = ☒ Unadjusted Rebate = \$

Adjusted HERO Rebate = \$ Adjustment = ☒ Adjusted HERO Rebate = \$

Mandatory Requirements		TOTAL	ADJ.MTL
Met=1 Not Met=0		0 =	X 0.50
#1) Duct Reqmt. =		1 =	X 0.58
#2) Chase Reqmt. =		2 =	X 0.67
#3) Knee Wall Reqmt. =		3 =	X 0.75
#4) Fire Place Opening Req. =		4 =	X 0.83
#5) Recessed Light Reqmt. =		5 =	X 0.92
#6) Attic Access Reqmt. =		6 =	X 1.00
#7) Added Attic Insul. =			
#8) Added Wall Insul. =			
#9) Gas Heat Effic. Incr. or HP =			
#10) HWH Effic. Incr. =			
#11) Window Upgrade =			
#12) Upgrade Package =			
<b>TOTAL</b> =			

July 1 - Sept. 30, 2006





NEW Dated Slab Pour Receipt now required with all NEW HOMES

## Rating Information on New Homes

for the Final

This score is the home as it was built - after recommendations have been inspected for and verified

HERO Cover Sheet		To : <a href="mailto:ratehero@dnr.state.la.us">ratehero@dnr.state.la.us</a>	Rater Name: <b>John Q. Rate</b>	SSN/VIN# <b>123-45-6789</b>	Rater Phone: <b>504-129-7895</b>																																																												
If this Rating is a PRELIMINARY = <input type="checkbox"/> New Home <input type="checkbox"/> Existing Home <input type="checkbox"/> Preliminary Score <input type="checkbox"/> Preliminary																																																																	
Provide Scan of a Signed Tax Letter with ALL PRELIMINARY																																																																	
If this Rating is a FINAL = <input checked="" type="checkbox"/> New Home <input type="checkbox"/> Existing Home <b>86.0</b> Preliminary <b>4/25/05</b> Preliminary																																																																	
Provide Scan of a Dated Slab Pour Receipt with ALL New Home FINALS <b>87.0</b> Final Score <b>83/05</b> Final Date																																																																	
Home Owner : <b>John Doe</b> Home Owner SSN/EIN# : <b>123-45678</b> Home Owner Phone : <b>225-123-4567</b>																																																																	
Rated Address : (Rating Property Address) (Street) (City) (Parish) Mailing Address (For Check from) (Street) (City) (Parish)																																																																	
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Scanned Documents (additionally for Existing Homes): Recpts : Cert. of Comp. :																																																																	
NEW Min. Score of <b>86.0</b> EXISTING Min. 30 pt increase on Final <b>87.0</b> NEW SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met) EXISTING If replacing AC - SEER 13 min. and Inspect for Voluntary Items (1-12 / each item carries a weighted Upgrade Point value - see p.2 of Cover Sheet)																																																																	
<table border="1"><thead><tr><th colspan="2">Mandatory Requirements</th><th>TOTAL</th><th>ADJMT.</th></tr></thead><tbody><tr><td>Met=1</td><td>Not Met=0</td><td>0 =</td><td>X 0.50</td></tr><tr><td>#1) Duct Reqmt.</td><td>=</td><td>1 =</td><td>X 0.58</td></tr><tr><td>#2) Chase Reqmt.</td><td>=</td><td>2 =</td><td>X 0.67</td></tr><tr><td>#3) Knee Wall Reqmt.</td><td>=</td><td>3 =</td><td>X 0.75</td></tr><tr><td>#4) Fire Place Opening Req.</td><td>=</td><td>4 =</td><td>X 0.83</td></tr><tr><td>#5) Recessed Light Reqmt.</td><td>=</td><td>5 =</td><td>X 0.92</td></tr><tr><td>#6) Attic Access Reqmt.</td><td>=</td><td>6 =</td><td>X 1.00</td></tr><tr><td>#7) Added Attic Insul.</td><td>=</td><td></td><td></td></tr><tr><td>#8) Added Wall Insul.</td><td>=</td><td></td><td></td></tr><tr><td>#9) Gas Heat Effic. Incr. or HP=</td><td>=</td><td></td><td></td></tr><tr><td>#10) HWH Effic. Incr.</td><td>=</td><td></td><td></td></tr><tr><td>#11) Window Upgrade</td><td>=</td><td></td><td></td></tr><tr><td>#12) Upgrade Package</td><td>=</td><td></td><td></td></tr><tr><td colspan="2">TOTAL</td><td></td><td></td></tr></tbody></table>						Mandatory Requirements		TOTAL	ADJMT.	Met=1	Not Met=0	0 =	X 0.50	#1) Duct Reqmt.	=	1 =	X 0.58	#2) Chase Reqmt.	=	2 =	X 0.67	#3) Knee Wall Reqmt.	=	3 =	X 0.75	#4) Fire Place Opening Req.	=	4 =	X 0.83	#5) Recessed Light Reqmt.	=	5 =	X 0.92	#6) Attic Access Reqmt.	=	6 =	X 1.00	#7) Added Attic Insul.	=			#8) Added Wall Insul.	=			#9) Gas Heat Effic. Incr. or HP=	=			#10) HWH Effic. Incr.	=			#11) Window Upgrade	=			#12) Upgrade Package	=			TOTAL			
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#12) Upgrade Package	=																																																																
TOTAL																																																																	
July 1 - Sept. 30, 2006																																																																	



## Phone Numbers

*Physical Address of  
Rated Home*

**NO LOT NUMBERS /  
ON FINAL SUBMITTALS**  
(If changing from a lot number to an  
address on the final - make this  
CLEAR in your e-mail to the person  
processing the rating)

*Address Where Check  
will be mailed*

**THIS ADDRESS COMES  
FROM THE W9**

Parish in which the home was rated and where the check was mailed

<b>HERO Cover Sheet</b>		To : <u>ratehero@dnr.state.la.us</u>		Rater Name : <b>John Q. Rater</b>		Rater SSN/VIN# : <b>123-45(6789)</b>		Owner Ph.# : <b>(225) 555-1212</b>																																																															
If this Rating is a <b>PRELIMINARY</b> =		New Home		Existing Home		Preliminary Score		Preliminary Date																																																															
Provide Scan of a Signed Tax Letter with ALL PRELIMINARIES				<input type="checkbox"/>																																																																			
If this Rating is a <b>FINAL</b> =		<input checked="" type="checkbox"/> New Home		<input type="checkbox"/> Existing Home		<b>86.0</b>		<b>4/25/05</b>																																																															
Provide Scan of a Dated Slab Pour Receipt with ALL New Home <b>FINALS</b>				<input checked="" type="checkbox"/>		<b>87.0</b>		<b>12/18/05</b>																																																															
Home Owner : <b>John Doe</b>		Home Owner SSN/EIN# :		<b>12-345678</b>		Home Owner Ph.# :		<b>(225) 555-2323</b>																																																															
Rated Address :		<b>123 Home Street 77777</b>		Mailing Address :		<b>456 W9 Street 78888</b>																																																																	
(Rating Property Address)		(Street) (Zip)		(For Check from W9)		(Street) (Zip)																																																																	
<b>Any Place, LA</b>		(City) (Parish) <b>Caddo</b>		<b>Mail, LA</b>		(City) (Parish) <b>Caddo</b>																																																																	
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## HERO Operations Manual

Utility Provider  
Information  
on ALL submittals

Utility Co. Name

Home Meter Number

Indicate which one  
(Acct. # or Mtr. #)

HERO Cover Sheet		To : <a href="mailto:ratehero@dnr.state.la.us">ratehero@dnr.state.la.us</a>	Rater Name : <b>John Q. Rater</b>		Rater SSN/VIN# : <b>123-45-6789</b>	Rater Ph. # : <b>(225) 555-1212</b>
If this Rating is a PRELIMINARY =		<input type="checkbox"/> New Home	<input type="checkbox"/> Existing Home	Preliminary Score		Preliminary Date
Provide Scan of a Signed Tax Letter with ALL PRELIMINARIES		<input type="checkbox"/>				
If this Rating is a FINAL =		<input checked="" type="checkbox"/> New Home	<input type="checkbox"/> Existing Home	Preliminary Score <b>86.0</b>		Preliminary Date <b>4/25/05</b>
Provide Scan of a Dated Slab Pour Receipt with ALL New Home FINALS		<input checked="" type="checkbox"/>		Final Score <b>87.0</b>		Final Date <b>12/18/05</b>
Home Owner : <b>John Doe.</b>		Home Owner SSN/EIN# :		Home Owner Ph.# : <b>12-345678</b>		<b>(225) 555-2323</b>
Rated Address : (Rating Property Address) <b>123 Home Street</b> (Street) <b>77777</b> (Zip) <b>Any Place, LA</b> (City) (Parish) <b>Caddo</b>		Mailing Address : (For Check from W9) <b>456 W9 Street</b> (Street) <b>Mail, LA</b> (City) (Parish) <b>Caddo</b>		<b>78888</b> (Zip)		
Utility Provider : <b>Power For U.</b>		Acct. # or Meter # : <b>25252525</b>		Rating Software		
Software Building Files : Base : (bldg. file name)		Prelim. : (bldg. file name)		Final : (bldg. file name)		Other : (bldg. file name)
Scanned Documents (for New and Existing Homes): Form 1119 : <b>Form W9</b>		Econ. Sum. : <b>Form W9</b>		EC&F. :		Scanned Documents (additionally for Existing Homes): Recpts : <b>Form W9</b>
NEW Min. Score of 86 on Final		EXISTING Min. 30 pt. increase on Final		NEW SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met)		EXISTING If replacing AC - SEER 13 min. and Inspect for
Ener. Eff. Prem. = \$		Ener. Eff. Prem. = \$		Voluntary Items (1-12 / each item carries a weighted Upgrade Point value - see p.2 of Cover Sheet)		
20% of EEP <b>X</b> .2		Cost of Improvements = \$		Mandatory Requirements		
Unadjusted Rebate = \$		Lesser of the above = \$		Met=1 Not Met=0		
Adjustment = <b>X</b>		20% of EEP or COI <b>X</b> .2		#1) Duct Reqmt. =		
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				#10) HWH Eff. Incr. =		
				#11) Window Upgrade =		
				#12) Upgrade Package =		
				TOTAL		
				TOTAL		

July 1 - Sept. 30, 2006



*Software Information  
on ALL submittals*

<b>HERO Cover Sheet</b>		To : <u>ratehero@dnr.state.ia.us</u>		Rater Name : <u>John Q Rater</u>		Rater SSN/VIN# <u>123-45-6789</u>		Rater Ph. # : <u>(225) 555-1212</u>	
If this Rating is a <b>PRELIMINARY</b> =		New Home		Existing Home		Preliminary Score		Preliminary Date	
Provide Scan of a Signed Tax Letter with ALL PRELIMINARIES		<input type="checkbox"/>							
If this Rating is a <b>FINAL</b> =		<input checked="" type="checkbox"/> New Home		<input type="checkbox"/> Existing Home		86.0		4/25/05	
Provide Scan of a Dated Slab Pour Receipt with ALL New Home FINALS		<input checked="" type="checkbox"/>		87.0		Final Score		12/18/05	
Home Owner : <u>John Doe</u>		Home Owner SSN/EIN# : <u>12-345678</u>		Home Owner Ph.# : <u>(225) 555-2323</u>					
Rated Address : <u>123 Home Street 77777</u>		Mailing Address : <u>456 W9 Street 78888</u>							
(Rating Property Address)		(For Check from W9)							
(Street)		(Zip)		(Street)		(Zip)			
<u>Any Place, LA</u>		<u>Caddo</u>		<u>Mail, LA</u>		<u>Caddo</u>			
(City)		(Parish)		(City)		(Parish)			
Utility Provider : <u>Power For U</u>		Acct. # or Meter # : <u>25252525</u>		Rating Software : <u>REMRate</u>		12.0			
(Utility Company Name)		Indicate One (Acct.# or Mtr.#)		(Software Name)		(Version)			
Software Building Files :									
Base <u>qbi123hsap1</u>		Prelim <u>qbi123hsap2</u>		Final <u>qbi123hsap80</u>		Other : <u>qbi123start</u>			
(bfg, file name)		(bfg, file name)		(bfg, file name)		(bfg, file name)			
Scanned Documents (for New and Existing Homes):									
Form 1119 :		Form W9 :		Econ. Sum. :		EC&F. :			
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				#11) Window Upgrade =					
				#12) Upgrade Package =					
				TOTAL					



# HERO Cover Sheets

Scanned  
Documents  
on ALL Finals

Insert the word **CHANGED** here  
if the final requires a revised  
W-9 submittal due to a change  
of mailing address since the  
preliminary was submitted  
(this **CHANGED** can be hand written)

An Electronically Scanned  
File of EACH of these  
Documents MUST  
be included with every  
Final Submittal

An Electronically Scanned  
File of these Documents  
MUST be included with every  
Final Submittal for an Existing  
Home ONLY

HERO Cover Sheet	To : <a href="mailto:ratehero@dnr.state.la.us">ratehero@dnr.state.la.us</a>	Rater Name <b>John Q. Rater</b>	Rater SSN/VIN# <b>123-45-6789</b>	Rater Ph. # : <b>(225) 555-1212</b>																
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July 1 - Sept. 30, 2006



## *Mandatory Prescriptive Requirements that all Raters MUST Inspect for when doing an Energy Rating*

*These are MANDATORY Steps that MUST be in place in order for the home to even be eligible for a rebate*

### *Regardless of the Final Rating Score*

#### ~~*New Homes*~~

- ~~*• Must have a minimum of a SEER 13 HVAC*~~

#### *Existing Homes*

- Require a minimum SEER 14 if adding an air conditioning upgrade*
- Must obtain a minimum of 2 Upgrade Points from something other than the HVAC in order to qualify for the program*





## **Mandatory Efficiency Requirements that Inspectors MUST Inspect for when doing an Energy Rating on a New Home**

Meeting all of these Mandatory Requirements will result in a full score of 6 on the ADJUSTMENT TABLE of the HERO Cover Sheet. A one Point deduction will be assessed for each of these infractions that are not met. Refer to pages 66 & 68 of this manual for details on how to document PASS and NOT Met Requirements and use of the adjustment.

**These Requirements are in addition to a new home scoring a minimum of 86**

**DUCTS** - If the mechanical system ducts are rigid - inspect for plastic sealing

If the mechanical system ducts are flex - also inspect that they are rigidly secured with straight runs and no more than a 45 degree bend, except at registers

**CHASE** - If the mechanical system has a chase - inspect that the chase has been sealed, floored, and if on an exterior wall - insulated

**KNEE WALL** - If the home has any knee wall construction that uses a dry blown insulation material - inspect that some type of retaining sheathing to hold it in place has been installed

**FIRE PLACE** - If the home has a fireplace that penetrates the envelope - inspect that the chimney opening in the attic has been sealed and insulated

**RECESSED LIGHTS** - If the home has recessed lighting fixtures - inspect that the cans are air tight

**ATTIC ACCESS** - If the attic access door is inside the envelope of the home - inspect that the access has been sealed and insulated





## Mandatory Requirements

*In Chart form (for New Homes) (All 6 are Mandatory to = 1 X Attachment )*

### New Homes Mandatory Inspection Requirements (all of 1 thru 6)

#1 Duct Reqmt.	IF THE MECHANICAL SYSTEM DUCTS ARE RIGIDLY SECTED FOR SEALING. IF THE MECHANICAL SYSTEM DUCTS ARE NOT RIGIDLY SECURED WITH STRAIGHT RUNS, AND NOT MORE THAN A 45 DEGREE BEND, EXCEPT AT REGISTERS.
#2 Chase Reqmt.	IF THE MECHANICAL SYSTEM HAS A CHASE - INSPECT THAT THE CHASE IS DRY WALLED, AND IF ON AN EXTERIOR WALL - INSULATED.
#3 Knee Wall Reqmt.	IF THE HOME HAS ANY KNEE WALL CONSTRUCTION THAT USES A DRY BRICK OR INSULATION MATERIAL, INSPECT THAT SOME TYPE OF RETAINING SHEATHING TO HOLD IN PLACE HAS BEEN INSTALLED.
#4 Fire Place Opening Reqmt.	IF THE HOME HAS A FIREPLACE THAT PENETRATES THE ENVELOPE - INSPECT THAT THE CHIMNEY OPENING IN THE ATTIC HAS BEEN SEALED AND INSULATED.
#5 Recessed Light Reqmt.	IF THE HOME HAS RECESSED LIGHT FIXTURES - INSPECT THAT THE CANS ARE TIGHT.
#6 Attic Access Reqmt.	IF THE ATTIC ACCESS DOOR IS INSIDE THE ENVELOPE OF THE HOME - INSPECT THAT THE ACCESS HAS BEEN SEALED AND INSULATED.



## Mandatory Requirements

### Adjustment Table (for New Homes)

(All 6 are Mandatory 1 X Adjustment)

New Home Requirements  
(1 thru 6 only)

Mandatory Requirements		→	TOTAL ADJMT.
Met=	Not Met=		
		0 =	0.50
#1) Duct Reqmt.	___	1 =	X 0.58
#2) Chase Reqmt.	___	2 =	X 0.67
#3) Knee Wall Reqmt.	___	3 =	X 0.75
#4) Knee Place Opening	___	4 =	X 0.83
#5) Unobstructed Light Reqmt.	___	5 =	X 0.92
#6) Attic Access Reqmt.	___	6 =	X 1.00
#7) New R50 Ceiling Insul	___		
#8) New R19 Wall Insul	___		
#9) Gas Heat Effic. Incr	___		
#10) HWH Effic. Incr.	___		
#11) Window Upgrade	___		
#12) Upgrade Package	___		
TOTAL =			



*New PRESCRIPTIVE List of Voluntary Items and the Upgrade Points associated to each Voluntary Item. All Raters MUST Inspect for these Voluntary Items on Existing Homes that have changed out an HVAC System*

*If the home is not installing a new HVAC System - only a 30% increase in efficiency is required in order to participate with no need to meet the requirements of the Voluntary Items*

*You MUST achieve at least 2 Upgrade Points, from the list of 12 PRESCRIPTIVE Voluntary Items, in order to qualify for a partial rebate. A 2 point Upgrade will result in a .67 X multiplier. Achieving 6 Upgrade Points from the list of 12 PRESCRIPTIVE Voluntary Items will result in a total score of 6 on the ADJUSTMENT TABLE of the HERO Cover Sheet and = a 1 X multiplier. Refer to pages 67 & 69 of this manual for details on how to document MET and NOT MET Requirements*



## New **PRESCRIPTIVE** List of Voluntary Items

(Only need to be MET when installing a new HVAC System - SEER 14 min.)

The Voluntary Item requirement is in addition to an Existing Home meeting the minimum 30% increase in efficiency required by the program

(2 Upgrade Points are mandatory to participate and 6 Upgrade Points are required to = a 1 X Adjustment )

Voluntary Items 1-6 of 12 and the Upgrade Points associated to them:

Voluntary Item 1. The home owner will receive 6 Upgrade Points for changing out the duct system while upgrading the HVAC system to a SEER 14. The new duct system must meet the same Duct Requirements that are listed for ducts under new homes. Completely MEET or receive no Upgrade Points.

Voluntary Item 2. The home owner will receive 3 Upgrade Points for sealing and insulating an existing chase when upgrading the HVAC system to a SEER 14. If the home has no chase, or if the existing chase was already sealed OR insulated, the homeowner CAN NOT receive any Upgrade Points under this category.

Voluntary Item 3. The home owner will receive 6 Upgrade Points for insulating all existing knee walls while upgrading the HVAC system to a SEER 14. The knee wall insulation installation must meet the same Knee Wall Requirements that are listed for knee walls under new homes. If the home has no knee walls, or if the existing knee walls already meet this requirement, the homeowner can not receive Upgrade Points in this category. Completely MEET on all existing knee walls or receive no Upgrade Points.

Voluntary Item 4. The home owner will receive 3 Upgrade Points for sealing and insulating the chimney opening in the attic while upgrading the HVAC system to a SEER 14. If the existing home's fireplace opening already meets this requirement, or is outside of the envelope, the homeowner can not receive any Upgrade Points in this category.

Voluntary Item 5. The home owner will receive 3 Upgrade Points for making all of the existing recessed lights air tight while upgrading the HVAC system to a SEER 14. If the existing home has no recessed lights, the homeowner can not receive Upgrade Points in this category. Completely MEET on all existing recessed lights or receive no Upgrade Points.

Voluntary Item 6. The home owner will receive 3 Upgrade Points for sealing and insulating the attic access door while upgrading the HVAC system to a SEER 14. If the existing home's attic access already meets this requirement, or is outside of the envelope, the homeowner can not receive Upgrade Points in this category.



## New **PRESCRIPTIVE** List of Voluntary Items (cont.)

(Only need to be MET when installing a new HVAC System - SEER 13 min.)

*The Voluntary Item requirement is in addition to an Existing Home meeting the minimum 30% increase in efficiency required by the program*

*(2 Upgrade Points are mandatory to participate and 6 Upgrade Points are required to = a 1 X Adjustment )*

*Voluntary Items 7-12 of 12 and the Upgrade Points associated to them:*

*Voluntary Items 7 & 8. The home owner will receive 2 Upgrade Points for every R5 increase in the attic insulation to reach a minimum of R30 in the attic, AND/OR will receive 2 Upgrade Points for every R5 increase in the wall insulation to reach a minimum of R19 in the walls while upgrading the HVAC system to a SEER 14. If the existing home already has the R-Value that credit is being claimed for, the homeowner can receive no Upgrade Points in this category.*

*Voluntary Item 9. The home owner will receive 4 Upgrade Points for upgrading the efficiency of the heating system while upgrading the HVAC system to a SEER 14, or by replacing a conventional HVAC with a 14 SEER Heat Pump. Simply replacing the existing heating system without an efficiency increase will entitle the homeowner to receive no Upgrade Point in this category.*

*Voluntary Item 10. The home owner will receive 3 Upgrade Points for upgrading the efficiency of the water heater while upgrading the HVAC system to a SEER 14. Simply replacing the existing water heater without an efficiency increase will entitle the homeowner to receive no Upgrade Points in this category.*

*Voluntary Item 11. The home owner will receive 2 Upgrade Points for every 3 windows that are upgraded in efficiency while upgrading the HVAC system to a SEER 14. If the replacement windows do not carry an efficiency increase, the home owner will receive no Upgrade Points in this category. Credit is only given for 3 window combination upgrades only, ie... 3 windows = 2 Upgrade Points, 4 windows = 2 Upgrade Points, 5 windows = 2 Upgrade Points, 6 windows = 4 Upgrade Points, etc.*

*Voluntary Item 12. When upgrading the HVAC system to a SEER 14, the home owner will receive 2 Upgrade Points for installing a programmable thermostat, and adding an R8 insulation blanket to their water heater, and replacing at least 2 permanent lighting fixtures with compact fluorescent controlled by occupancy sensors. If any portion of this upgrade is pre-existing the home owner can claim no Update Points unless they follow the HERO Cover Sheet substitution guidelines.*





*You must include the receipts for all of the Voluntary Items that are claiming Upgrade Points with the receipts for the improvement work that was done - even if the money is not tracked on the Form 1119*

*HERO Cover Sheet Page 2*



## Voluntary Upgrades

### Adjustment Table (for Existing Homes)

(2 Upgrade Points are Mandatory to = a .67 X Adjustment, or 6 Upgrade Points from the list of the 12 Voluntary Upgrades = 1 X Adjustment )

Existing Home  
Voluntary  
Upgrades  
(any 6 point  
combination from  
any category)

<u>Mandatory Requirements</u>		→	<u>TOTAL</u>	<u>ADJMT.</u>
<b>Met=1</b>	<b>Not Met=0</b>		0 =	<b>X</b> 0.50
#1) Duct Reqmt.	___		1 =	<b>X</b> 0.58
#2) Chase Reqmt.	___		2 =	<b>X</b> 0.67
#3) Knee Wall Reqmt.	___		3 =	<b>X</b> 0.75
#4) Fire Place Opening	___		4 =	<b>X</b> 0.83
#5) Recessed Light Reqmt.	___		5 =	<b>X</b> 0.92
#6) Attic Access Reqmt.	___		6 =	<b>X</b> 1.00
#7) New R30 Attic Insul	___			
#8) New R19 Wall Insul	___			
#9) Gas Heat Effic. Incr	___			
#10) HWH Effic. Incr.	___			
#11) Window Upgrade	___			
#12) Upgrade Package	___			
<b>TOTAL</b>	<b>=</b> ___	<b>--</b>		





## HERO Cover Sheets

Energy Efficient  
Premium -  
Calculated from a  
two building  
Economic Summery  
Report  
for New Homes

Energy Efficient Premium

20% of Energy Efficient Premium  
to a MAX of \$2,000

HERO Cover Sheet	To : <a href="mailto:ratehero@dnr.state.la.us">ratehero@dnr.state.la.us</a>	Rater Name : <b>John Q. Rater</b>	SSN/VIN# : <b>123-45-6789</b>	Rater Phone : <b>(225) 555-1212</b>																																													
If this Rating is a PRELIMINARY = <input type="checkbox"/> New Home <input type="checkbox"/> Existing Home <input type="checkbox"/> Preliminary Score <input type="checkbox"/> Preliminary																																																	
Provide Scan of a Signed Tax Letter with ALL PRELIMINARY																																																	
If this Rating is a FINAL = <input checked="" type="checkbox"/> New Home <input type="checkbox"/> Existing Home <b>86.0</b> Preliminary <b>4/25/05</b> Preliminary																																																	
Provide Scan of a Dated Slab Pour Receipt with ALL New Home FINALS <b>87.0</b> Final Score <b>105</b> Final Date																																																	
Home Owner : <b>John Doe</b> Home Owner SSN/EIN# : <b>5678</b> Home Owner Phone : <b>(225) 555-2323</b>																																																	
Rated Address : <b>123 Home Street</b> <b>77000</b> Mailing Address : <b>456 W9 Street</b> <b>77000</b>																																																	
(Rating Property Address) (City) (Parish) (Zip) (For Check from) (City) (Parish) (Zip)																																																	
Utility Provider : <b>Power For U</b> Acct. # or Meter : <b>252525</b> Rating Software : <b>Kate</b> <b>12.0</b>																																																	
(Utility Company Name) Indicate One (Acct. # or Meter) (Software Name) (Version)																																																	
Software : <b>qbi123</b> <b>qbi123hsap2</b> <b>123hsap80</b> <b>qbi123start</b>																																																	
Base : (bldg. file name) Prelim. : (bldg. file name) Final : (bldg. file name) Other : (bldg. file name)																																																	
Scanned Documents (for New and Existing Homes):																																																	
Form 1119 : <input checked="" type="checkbox"/> Econ. Sum. : <input checked="" type="checkbox"/> EC&F : <input checked="" type="checkbox"/> Recpts : <input type="checkbox"/> Cert. of Comp. : <input type="checkbox"/>																																																	
NEW Min. Score of <b>10,000</b> EXISTING Min. 30 pt increase on Final <b>NEW SEER 13 min. and Inspect for all 6 Mandatory Requirements (1-6 only / 1 if met 0 if not met)</b>																																																	
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July 1 - Sept. 30, 2006																																																	



*Energy Efficient  
Premium vs  
Installed Cost -  
Whichever is LESS  
for  
Existing Homes*

### Improvement Cost

### Lesser of the two

July 1 - Sept. 30, 2006



## HERO Cover Sheets

### NEW Prescriptive Measures for New Homes

If a Requirement is met = 1  
If a Requirement is not met = 0  
(NEW HOMES 1-6 only)

Multiply X Adjustment

Adjusted Rebate

HERO Cover Sheet	To : <a href="mailto:ratehero@dnr.state.la.us">ratehero@dnr.state.la.us</a>	Rater Name : <b>John Q. Rater</b>	SSN/VIN# : <b>123-45-6789</b>	Rater Phone : <b>(225) 555-1212</b>																																													
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Ener. Eff. Prem. = <b>\$10,000</b> 20% of EEP <input checked="" type="checkbox"/> .2 Unadjusted Rebate = <b>\$2,000</b> Adjustment = <b>0.83</b> Adjusted HERO Rebate = <b>\$1,660</b>																																																	
Cost of Improvements = \$ Lesser of the above = \$ 20% of EEP or COI <input checked="" type="checkbox"/> .2 Unadjusted Rebate = \$ Adjustment = <input checked="" type="checkbox"/> Adjusted HERO Rebate = \$																																																	

(All 6 are Mandatory to = 1 X Adjustment )



## *NEW Voluntary Upgrades for Existing Homes*

*If a Requirement is met =value*  
*If a Requirement is not met = 0*  
**EXISTING HOMES**  
*(see p. 62 & 63 for values)*

*Multiply X THIS adjustment-*

**Adjusted Rebate**

*(2 Upgrade Points Mandatory, or a total of 6 to = 1 X Adjustment )*





## SONRIS Inquiries

[www.dnr.louisiana.gov](http://www.dnr.louisiana.gov)

Home Owner  
and Raters Click  
here for an Inquiry

**Offices**  
Coastal Restoration & Management  
Conservation  
Mineral Resources  
Secretary

**Resource Finder**  
About the Agency  
Business and Consumer Services  
Contact DNR  
Events Calendar  
Links  
Newsletters  
News Releases  
Organization  
Rules  
Search  
Site Map  
Strategic Plan  
Staff  
Teachers, Students and Kids  
Visitor Center

**Employees Only**  
Employee Resource Center  
Email Access

**DNR Web Services**  
Web Services and Policies

**Special Notice**  
• Department directive on Gifts and Gratuities

**Post-Hurricane News**  
**Wednesday, December 14, 2005**  
• Louisiana In-State Daily Production and Pipeline Update  
• State's Energy Office features programs, information, and energy facts  
• U.S. Department of Energy Situation Report Updates  
• DNR provides Web links of interest  
• Governor Blanco creates Louisiana Recovery Authority

**News from the Department**  
**Top Story**  
• Full Flood Safety in New Orleans Could Take Billions and Decades (New York Times, 11/29/05)  
**Office of the Secretary**  
• DNR and Corps officials sponsored Buffalo Cove Ground Breaking  
• Governor Highlights Success of Special Session '05 (Coastal protection included)  
• DOE grant with state energy office to enhance rebuilding efforts  
• Angelle pleads for more funds (Baton Rouge Advocate, 9/12/05)  
• Secretary Angelle provides remarks to Congress  
• Listen to the testimony (MP3 audio, 10MB)  
• DNR presents awards for energy conservation  
• Houston oil and gas companies host DNR group  
• State Completes Bayou Postillion Project in Iberia Parish  
• Atchafalaya Basin Program ribbon cutting and ground breaking December 2

**Conservation**  
• DNR Geologist Named Vice President of National Group  
• DNR Welcomes Korean Energy Company to State  
• Exceptions to the regulations of the Office of Conservation for Hurricanes Katrina and Rita  
• Commissioner offers exceptions for oil and gas operators  
• Conservation Order Addresses Sustainability of Sparta Aquifer  
• Minor revisions to the E&P Waste Laboratory Procedures Manual completed during May 2005  
• Statewide Order No. 29-R-05/06 - Fee Schedule for FY 05/06, effective November 20, 2005

**Featured Services**  
Database Access  
Document Imaging  
GIS Mapping  
**SONRIS**  
**America's WETLAND**  
Campaign to Save Coastal Louisiana  
Special DNR Publication  
America's Energy Corridor  
**Business and Consumer Services**  
Atchafalaya Basin Program  
Clean Marina Program  
Coastal Restoration Projects  
Coastal Use Permitting  
Conservation Orders  
Ground Water Resources  
Mariculture Task Force  
Home Energy Rebate Option  
Oyster Lease Evaluation  
State Mineral Board  
State Energy Office  
*more services...*



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and Raters Click  
here for an Inquiry

**Louisiana.gov > Department of Natural Resources > SONRIS**

**DNR Home SONRIS Main Help Downloads FAQs Disclaimer Feedback About**

**Database Access**

- SONRIS Lite
- Conservation
- Minerals
- General Reports
- Coastal Use Permits

**Document Access**

- Document Images

**GIS Access**

- Interactive Maps
- Tutorial and What's New

**Application Help**

- FAQs

**Data Reporting**

- Online Reporting
- Electronic Reporting

**Data Exchange**

- Procedure
- Data Exchange FAQs

**Electronic Payments**

- Procedure

**Introduction**

**Welcome to SONRIS!** This service of the Louisiana Department of Natural Resources provides you free, Web-accessible information through the access method of your choice:

**Need help getting started?**

- Database Access Classic Quick Tour
- Document Access Quick Tour
- GIS Access Map Tutorial
- Frequently Asked Questions
- DNR Glossary
- Download required browser add-ons

► **Database Access:** retrieve online, real-time information related to oil and gas drilling/production, State mineral leases, coastal data, HERO applications, and much more, all from the DNR Oracle database using sophisticated queries. You can also view pre-built reports such as Conservation Scout Reports in Adobe Acrobat PDF format. Choose from either SONRIS "Lite", an HTML-based capability designed for low-bandwidth users, or SONRIS "Classic", a robust form-based query capability. [more details](#)

► **Document Access:** query and view millions of electronic document images, e.g., Office of Conservation oil/gas production cards and field orders, and Office of Mineral Resources lease records. [more details](#)

► **GIS Access:** retrieve information using interactive, geographically oriented, map capabilities, and select from a variety of layers of backgrounds. [more details](#)

**Database Access**

The Database Access component features two access methods:

**SONRIS Lite...access via HTML**

Most database access users elect to use **SONRIS Lite**, our popular, quick access method to frequently-requested information. Designed for low-bandwidth connections, this version of SONRIS Database Access uses only HTML, not JInitiator or JVM. HTML pages created by Lite are easily printed and can be copied into Excel. Current availability includes items such as well information by serial number, well info by section/township/range, and lease ownership by lease number. Other items are being added. Support is provided for Internet Explorer 6, and previous versions as well.

**SONRIS Classic...access via Oracle Forms**

This access method offers additional query functionality via Java-enabled forms. SONRIS Classic requires the Internet Explorer browser add-on known as Oracle JInitiator version 1.1.8.10. You may [download a free copy of JInitiator 1.1.8.10](#) or request a free [CDROM](#) containing the new JInitiator.

Additional information about [Web browser and add-on requirements](#) is available.

**Document Access to Electronic Images**





## SONRIS Inquiries

[www.dnr.state.la.us](http://www.dnr.state.la.us)

**SONRIS Lite**

**Database Access**

- SONRIS Lite
- Conservation
- Minerals
- General Reports
- Coastal Use Permits
- Document Access
- Document Images
- GIS Access
- Interactive Maps
- Tutorial and What's New
- Application Help
- FAQs
- Data Reporting
- Online Reporting
- Electronic Reporting
- Data Exchange
- Procedure
- Data Exchange FAQs
- Electronic Payments
- Procedure

**Conservation**

- Well Information**
  - Offshore Wells By Parish
  - Orphan Wells By Parish
  - Permitted Wells By Parish
  - Retrieve Compliance Review By Serial Number
  - Scout Report Information
  - Severance Tax Relief Report
  - Well Count for Field By Organization
  - Well Count for Organization By Field
  - Well Permits by District
  - Wells by API Number
  - Wells by Field ID
  - Wells by Lambert Coordinates
  - Wells by Organization Name
  - Wells by Parish
  - Wells by Section, Township and Range
  - Wells by Serial Number
  - Wells by Specific Field / Operator
  - Wells by State Lease
  - Wells (Excluding Well Status 03,28,29,30)
- Transportation Information**
  - Current Authorized Transporters
  - Imports & Exports by Company by Month
  - Imports & Exports by State/Country by Year
  - R2 Data Entry (Oil Transporter)
  - R3 (Refinery) Activity Report Product Listing
  - R3 (Refinery) Summary Report
  - R3 Data Entry (Refinery)
  - RST Data Entry (Natural Gas Transporter)
  - RST Natural Gas Transporters Details Report
  - RST-Sum Acquisitions
  - RST-Sum Dispositions
  - RST Summary Report (Group 268)
  - R6 Data Entry (Gasoline and/or Cycling Plant)
  - RC Data Entry (Import/Export)
  - Transporter Cross Check Listing
- Codes/Lookups**
  - API Offshore Area Code Information
  - Area Code Information
  - Consumer Information
  - District Information
  - DNR Glossary
  - Drip Point Information by Field
  - Drip Point Information by Name
  - Drip Point Information by Organization
  - Facility Code Description
  - Field List by Requested District & Area
  - Field Listing
  - Fields by Parish
  - Group Code Information
  - Location Codes
  - LUW Information by Code Number
  - LUWs by Name
  - LUW Type Code Information
  - Operation Type Codes
  - Organizational Mailing Address List
  - Organization Information by Name
  - Organization Ledger Listing-Alpha
  - Organization Ledger Listing-Numeric
  - Organization Type Codes
  - Organizations by Parish
  - Parish Information
  - Product Type Code Information
  - Retrieve Operator Compliance Details
  - Reservoir Nomenclature Abbreviations
  - Scout Report Codes and Terminology
  - Well Class Type Information
  - Well Status Code List
- Production Information**
  - Disposition by Field, Operator, Report Date
  - Field Production by Parish for a Period
  - Field Production by Year
  - Field Production for an Organization by Month
  - Monthly Parish Production for a Period
  - Louisiana LUW Production by Year
  - LUW Production by Month
  - OGP Data Entry (Oil & Gas Production)
  - OGP Ledger by Commingling Facility
  - OGP Ledger by LUW
  - Operator Oil/Gas Production for a Year
  - Operator Production by Parish
  - Organization Production for a Field by Month
  - RSD Data Entry (Gas Disposition)
  - Ranking Gas Production by Field
  - Ranking Gas Production by Operator
  - Ranking Oil Production by Field
  - Ranking Oil Production by Operator
  - Statewide Monthly Production for a Year
  - Yearly Production by Parish
- Injection Information**
  - Class I Monitoring
  - Class I Quarterly Reports
  - Injection Wells by Operator
  - Injection Wells by Parish
  - Sonar and Mit Report by Well Serial Number
  - Sonar and Mit Reports
  - USDW Area Information
- Pre-run Reports**
  - Lafayette Scout Details
  - Lafayette Scout Summary
  - Lafayette Gas Production Schedule

**Minerals**

- Annual Income Analysis of Leases Awarded
- Dedicated Funds Report
- Lease Analysis Report
- Lease Instruments By Lease Number
- Lease Ownership by Lease Number
- Lease Ownership by Owner Name
- Lease Sale and Tract History
- Payor Allocation by Payor ID
- Query Lease Data
- View Tract Bids

**Coastal**


- DCP and Continuous Data
- Discrete Data
- Emergent Vegetation Data
- Surface Elevation Data

**Secretary**

- Accounting Reports**
  - Wildlife and Fisheries Cash Receipts
- HERO Application Status**
  - Homeowner/Builder Inquiry
  - Rater Inquiry
- No. HERO Applications**
  - Homeowner/Builder Inquiry


Choose between  
Home Owner  
or Rater, and Click  
here for an Inquiry





## LDNR HERO Applications

### Homeowner/Builder Inquiry




Monthly and Yearly Record Counts

Homeowner  
SSN

Homeowner/Builder ID

• Input numbers only, no hypens

• Last Name




Submit


The site is now encrypted

Homeowner Inquiries now require the last name of the applicant as well






**LDNR HERO Applications**  
**Homeowner/Builder Inquiry**



Monthly and Yearly Record Counts

CO Number	Rated Address	Rated City	Status	Prelim Recv by DNR	Final Recv by DNR	Final Review	Prelim Rating	Final Rating	Check Requested	Award Chk Date	Customer Chk Amt	Chk No.	Rater Name
		DOWNSVILLE	PAID	02/10/00			68.7	86.7	02/10/00	02/18/00	\$1,140.00		



*The site is now encrypted*

*All of the Homeowner rating information is listed under this inquiry*



## LDNR HERO Applications Rater Inquiry



Monthly and Yearly Record Counts

• Rater Id

• Input formatted numbers. (Examples: 72-9999999 or 999-99-9999)



*The site is now  
encrypted  
as well*

*Click HERE for  
current count*



## LDNR HERO Applications Record Counts



### Monthly and Yearly Record Counts

Month-to-date Count	Fiscal Year-to_date Count
102	919



Utility Rates are posted HERE for North and South Louisiana  
- updated in late February each year

Home Owner's  
information

Customer Number =  
CO Number



## LDNR HERO Applications

### Rater Inquiry



Monthly and Yearly Record Counts

- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
- NEWS: -----Electricity-----Natural Gas
- NEWS: North Louisiana-----.0855 per Kwh-----8813 per Ccf
- NEWS: South Louisiana-----.0826 per Kwh-----8813 per Ccf
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Customer Name	CO Number	Rated Address	Rated City	Status	Prelim Recv by DNR	Final Recv by DNR	Final Reviewed	Prelim Rating	Final Rating	Check Requested	Award Chk Date	Customer Chk Amt	Chk No.	Rater Chk Amt
			E FERRIDAY	SUSPENSE	03/04/04			72.7						
			RUSTON	SUSPENSE	09/15/04			80.0						
			CALHOUN	SUSPENSE	11/16/04			80.0						
			MONTGOMERY	SUSPENSE	07/13/04			80.0						
			WEST MONROE	SUSPENSE	03/03/03			80.0						
			QUITMAN	SUSPENSE	12/21/04			67.6						
			WEST MONROE	SUSPENSE	03/04/04			80.0						
			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
			RAYVILLE	SUSPENSE	10/21/04			76.5						





# HERO Operations Manual

**SUSPENSE** = Any Active file still in process

**PAID** = Any file that has cleared the system and been paid

**CANCELLED** = An Active file that has passed its allocation time



## LDNR HERO Applications

### Rater Inquiry



Monthly and Yearly Record Counts

- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
- NEWS: -----Electricity-----Natural Gas
- NEWS: North Louisiana-----.0855 per Kwh-----8813 per Ccf
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U			RUSTON	SUSPENSE	09/15/04			80.0						
A			CALHOUN	SUSPENSE	11/16/04			80.0						
V			MONTGOMERY	SUSPENSE	07/13/04			80.0						
A			D WEST MONROE	SUSPENSE	03/03/03			80.0						
V			QUITMAN	SUSPENSE	12/21/04			67.6						
F			WEST MONROE	SUSPENSE	03/04/04			80.0						
I			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
A			E RAYVILLE	SUSPENSE	10/21/04			76.5						



Date that DNR  
entered the  
preliminary  
into SONRIS

When a date under this heading turns RED - it means that the 6 month set aside time for the money allocated to this rating has passed. If the home owner has a question when making an inquiry under the homeowner inquiry screen, they should call their rater. If the rater has a question about this when it shows up on their screen, the rater should call DNR.



## LDNR HERO Applications Rater Inquiry



### Monthly and Yearly Record Counts

NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)

NEWS: -----Electricity-----Natural Gas

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			D WEST MONROE	SUSPENSE	03/03/03			80.0						
			QUITMAN	SUSPENSE	12/21/04			67.6						
			WEST MONROE	SUSPENSE	03/04/04			80.0						
			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
			E RAYVILLE	SUSPENSE	10/21/04			76.5						



Date that DNR  
entered the final  
into SONRIS



## LDNR HERO Applications Rater Inquiry



### Monthly and Yearly Record Counts


- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
- NEWS: -----Electricity-----Natural Gas
- NEWS: North Louisiana-----.0855 per Kwh-----8813 per Ccf
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E I J A V A I A V E I A E			FERRIDAY	SUSPENSE	03/04/04			72.7						
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			WEST MONROE	SUSPENSE	03/04/04			80.0						
			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
E			RAYVILLE	SUSPENSE	10/21/04			76.5						




**If PROBLEM shows up in this block - it means that the final rating can not be processed by DNR. If the home owner has a question, they should call their rater. When the rater sees this he/she can click on the word PROBLEM and, can read what the problem is before they call DNR. This message will remain here untill the rater contacts DNR and addresses the problem**

*Date that DNR approves the final*

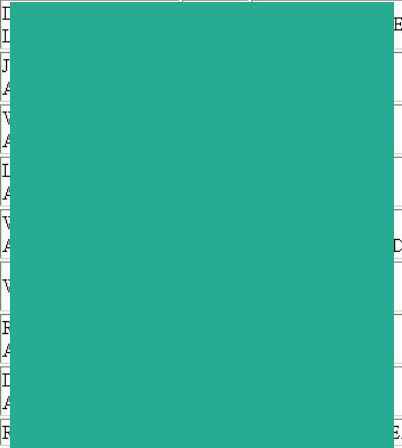




## LDNR HERO Applications Rater Inquiry



Monthly and Yearly Record Counts

- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
- NEWS: -----Electricity-----Natural Gas
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			RUSTON	SUSPENSE	09/15/04			80.0						
			CALHOUN	SUSPENSE	11/16/04			80.0						
			MONTGOMERY	SUSPENSE	07/13/04		problem	80.0						
			D WEST MONROE	SUSPENSE	03/03/03			80.0						
			QUITMAN	SUSPENSE	12/21/04			67.6						
			WEST MONROE	SUSPENSE	03/04/04			80.0						
			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
E			RAYVILLE	SUSPENSE	10/21/04			76.5						



Rating  
Information  
(SCORES)



## LDNR HERO Applications

### Rater Inquiry



Monthly and Yearly Record Counts

- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
- NEWS: -----Electricity-----Natural Gas
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[REDACTED]	[REDACTED]	[REDACTED]	FERRIDAY	SUSPENSE	03/04/04			72.7						
			RUSTON	SUSPENSE	09/15/04			80.0						
			CALHOUN	SUSPENSE	11/16/04			80.0						
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			WEST MONROE	SUSPENSE	03/03/03			80.0						
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			WEST MONROE	SUSPENSE	03/04/04			80.0						
			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
[REDACTED]	[REDACTED]	[REDACTED]	RAYVILLE	SUSPENSE	10/21/04			76.5						



Date that DNR  
sent the check request  
to accounting



## LDNR HERO Applications

### Rater Inquiry



Monthly and Yearly Record Counts

- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
- NEWS: -----Electricity-----Natural Gas
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			WEST MONROE	SUSPENSE	03/04/04			80.0						
			STERLINGTON	SUSPENSE	03/22/04	11/15/04	11/17/04	80.0	90.8					
E			RAYVILLE	SUSPENSE	10/21/04			76.5						





Date that accounting  
cut the check



## LDNR HERO Applications Rater Inquiry



Monthly and Yearly Record Counts

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E			RAYVILLE	SUSPENSE	10/21/04			76.5						



Amount of the check  
to the customer



## LDNR HERO Applications Rater Inquiry



Monthly and Yearly Record Counts


- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
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E			RAYVILLE	SUSPENSE	10/21/04			76.5						




Check Number -  
Builders can now  
flag a check to  
a property

If applicable



## LDNR HERO Applications

### Rater Inquiry



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Monthly and Yearly Record Counts

- NEWS: AVERAGE STATEWIDE UTILITY RATES FOR FY 2005 (July 1, 2004 - June 30, 2004)
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[REDACTED]	[REDACTED]	[REDACTED]	E FERRIDAY	SUSPENSE	03/04/04			72.7						
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E			RAYVILLE	SUSPENSE	10/21/04			76.5						



## Energy Star Labeled Homes



**An ENERGY STAR® Labeled Home**

Address:

Street Address 1 City 1 State

Built by:

Builder Name 1

Verified by:

Rater Name 1

Date:

Rating Date 1

Optional Information:

Optional Info 1 (Score)

This home has been individually verified by an independent professional to meet ENERGY STAR guidelines for energy efficiency. ENERGY STAR labeled homes protect the environment by using less energy.  
[www.energystar.gov](http://www.energystar.gov)

### ENERGY STAR for Homes Printing Tool



1. Enter Data for Your Homes Below

2. Load Sheets of Labels or Certificates into Your Printer

3. Click To Print Labels -----> [Print Labels](#)

4. Click To Print Certificates (optional) --> [Print Certificates](#)

(Note- all rows of data below will be printed)

Label Position	Builder Company Name	Address	City	State	Rater Co. Name	Rating Date	Optional Information	
Sheet 1	1	Test Builder Name 1	Street Address 1	City1	SA	Rater Name 1	1/1/01	Optional Information 1
	2	Test Builder Name 2	Street Address 2	City2	SB	Rater Name 2	2/2/01	88.2
	3	Test Builder Name 3	Street Address 3	City3	SC	Rater Name 3	3/3/01	Optional Information 3
	4	Test Builder Name 4	Street Address 4	City4	SD	Rater Name 4	4/4/01	86.7
Sheet 2	1	Wooden Creations	123 Any Street	Baton Rouge	LA	Gary Morris	12/5/01	89.2
	2							
	3							
	4							
Sheet 3	1							
	2							
	3							
	4							
Sheet 4	1							
	2							
	3							
	4							
Sheet 5	1							
	2							
	3							
	4							
Sheet 6	1							
	2							
	3							
	4							
Sheet 7	1							
	2							
	3							
	4							
Sheet 8	1							
	2							
	3							
	4							
Sheet 9	1							
	2							
	3							
	4							
Sheet 10	1							
	2							
	3							
	4							
Sheet 11	1							
	2							
	3							
	4							
Sheet 12	1							
	2							
	3							
	4							
Sheet 13	1							
	2							
	3							
	4							
Sheet 14	1							
	2							
	3							
	4							
Sheet 15	1							
	2							
	3							
	4							
Sheet 16	1							
	2							
	3							
	4							

87



## Energy Star Certificate



### An ENERGY STAR® Labeled Home

This certifies that the home built at

**Street Address 1, City 1, SA**

by Test Builder Name 1

and verified by Rater Name 1

meets ENERGY STAR guidelines for energy efficiency as established by the U.S. Environmental Protection Agency.

ENERGY STAR labeled homes protect the environment by using less energy.

Optional Information 1

January 1, 2001

David Lee  
Director  
ENERGY STAR Residential Programs

Sam Rashkin  
Director  
ENERGY STAR for New Homes

[www.energystar.gov](http://www.energystar.gov)



## *Energy Star Certificate*

*New Homes must have an Energy Star Label placed in the home in order for the homes to be posted on the Energy Star web site*

### *Correct placement of Energy Star Labels on New Homes*

- *STICKERS - Interior on the electric utility service box*
- *BRASS PLAQUES - To the right or just below the address plate on the home.*





## *Energy Star Certificate*

### *Correct placement of Energy Star Labels on New Homes*

- *STICKERS* - Interior on the electric utility service box
- *BRASS PLAQUES* - To the right or just below the address plate on the home.



## *HERO Operations Manual*

Energy Rated Homes

OF LOUISIANA

La Dept. of Natural Resources